Electronic Military Evaluations: Training Package

Section B: Specific Training Routing A Form

Specific Training Modules:

Sect A: Applying Signatures
Sect B: Routing a Form

As of 8 Sep 06:
The following slides provide step-by-step instructions for routing a form (in a variety of ways) within the AKO "My Forms" portal.
This portal is currently being redesigned to make it more user friendly.
Time for production? Unknown.
Once redesigned, you shouldn't need these slides.

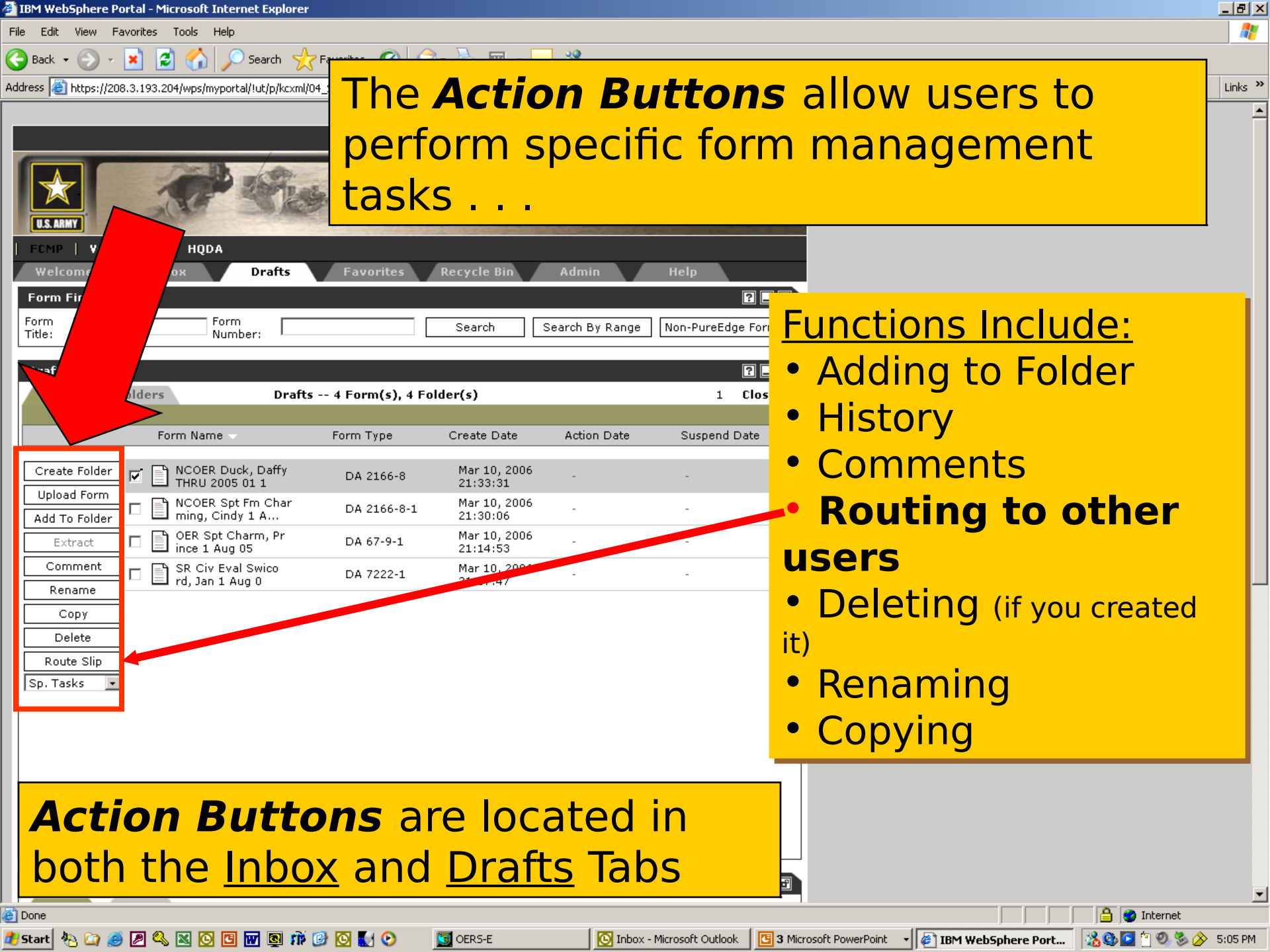
Coming Attractions:

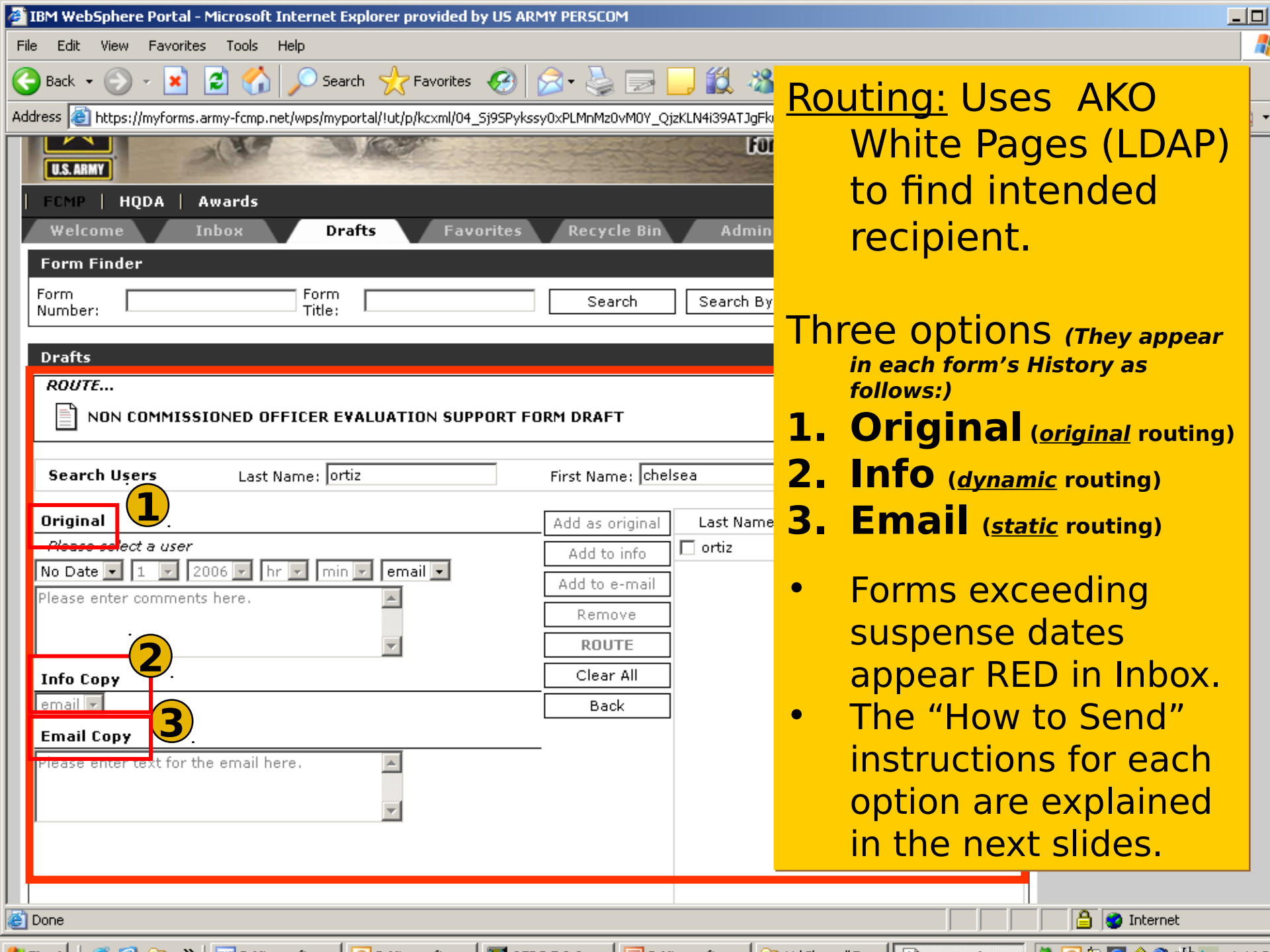
- *The routing slip is being redesigned as you read this to make it more user friendly. Once the new form is in place you shouldn't need slides.*

- *The next iteration of this program includes report capabilities on the Tracking Sections. You should be able to search and group information.*

- *Finally, don't forget folders. What you see here for forms can also be used for multiple documents at time when they have been placed in a folder.*

- *See help links on the AKO My Forms Help tab and our website below under: what's new, electronic Evaluations. This isn't just OER & NCOER…. It's for all Army forms….*


IBM WebSphere Portal - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Search
Address https://208.3.193.204/wps/myportal/!ut/p/kcxml/04_
Links
The Action Buttons allow users to perform specific form management tasks . . .
U.S. ARMY
FCMP
HQDA
Welcome
Drafts
Favorites
Recycle Bin
Admin
Help
Form Title:
Form Number:
Search
Search By Range
Drafts -- 4 Form(s), 4 Folder(s)
Form Name
Form Type
Create Date
Action Date
Suspend Date
NCOER Duck, Daffy THRU 2005 01 1
DA 2166-8
Mar 10, 2006 21:33:31
NCOER Spt Fm Char ming, Cindy 1 A...
DA 2166-8-1
Mar 10, 2006 21:30:06
OER Spt Charm, Pr ince 1 Aug 05
DA 67-9-1
Mar 10, 2006 21:14:53
SR Civ Eval Swico rd, Jan 1 Aug 0
DA 7222-1
Create Folder
Upload Form
Add To Folder
Extract
Comment
Rename
Copy
Delete
Route Slip
Sp. Tasks
Functions Include:
• Adding to Folder
• History
• Comments
• Routing to other users
• Deleting (if you created it)
• Renaming
• Copying
Action Buttons are located in both the Inbox and Drafts Tabs
Done
Internet
Start
OERS-E
Inbox - Microsoft Outlook
3 Microsoft PowerPoint
IBM WebSphere Port...
5:05 PM

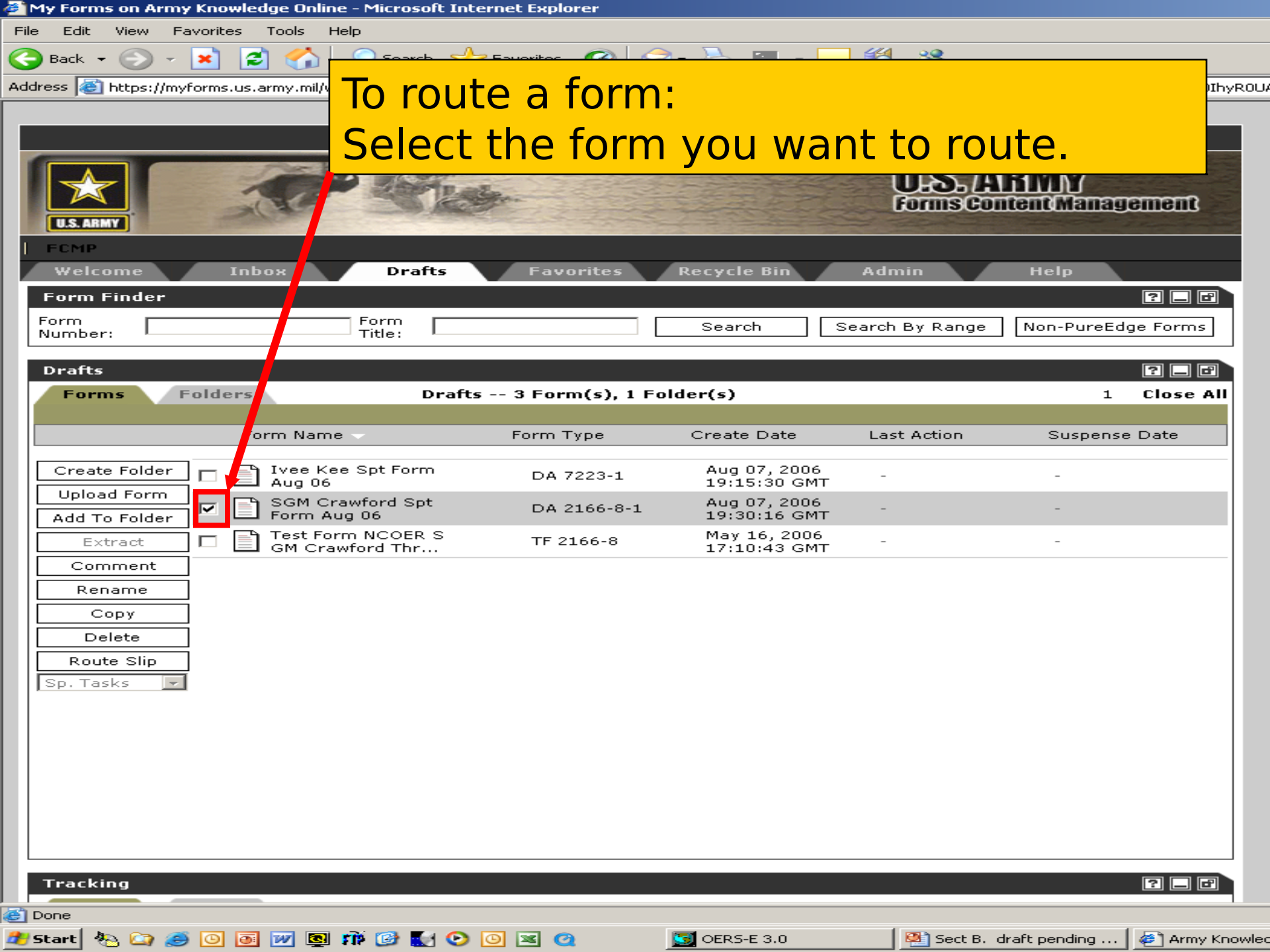


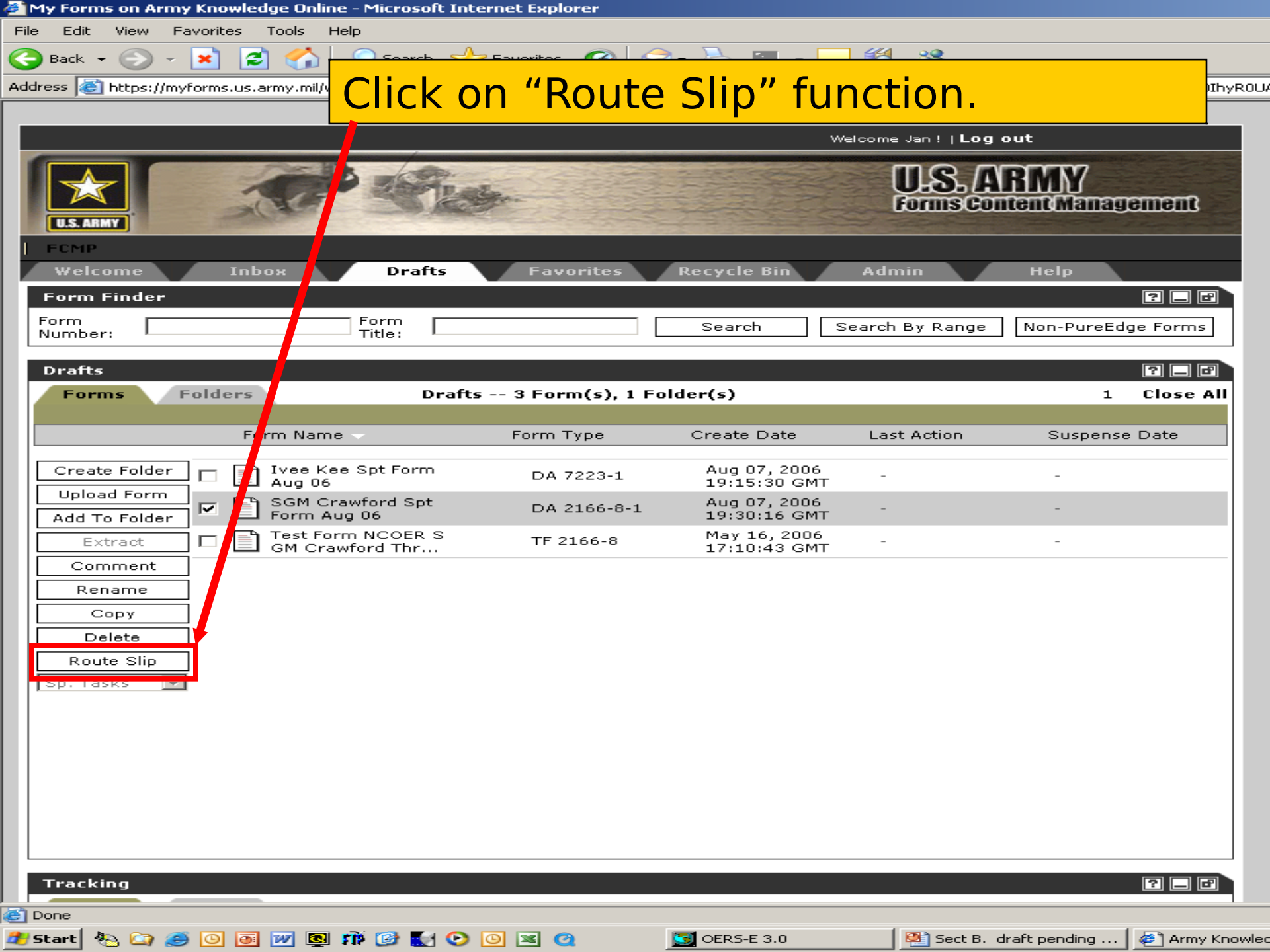
Routing: Uses AKO White Pages (LDAP) to find intended recipient.

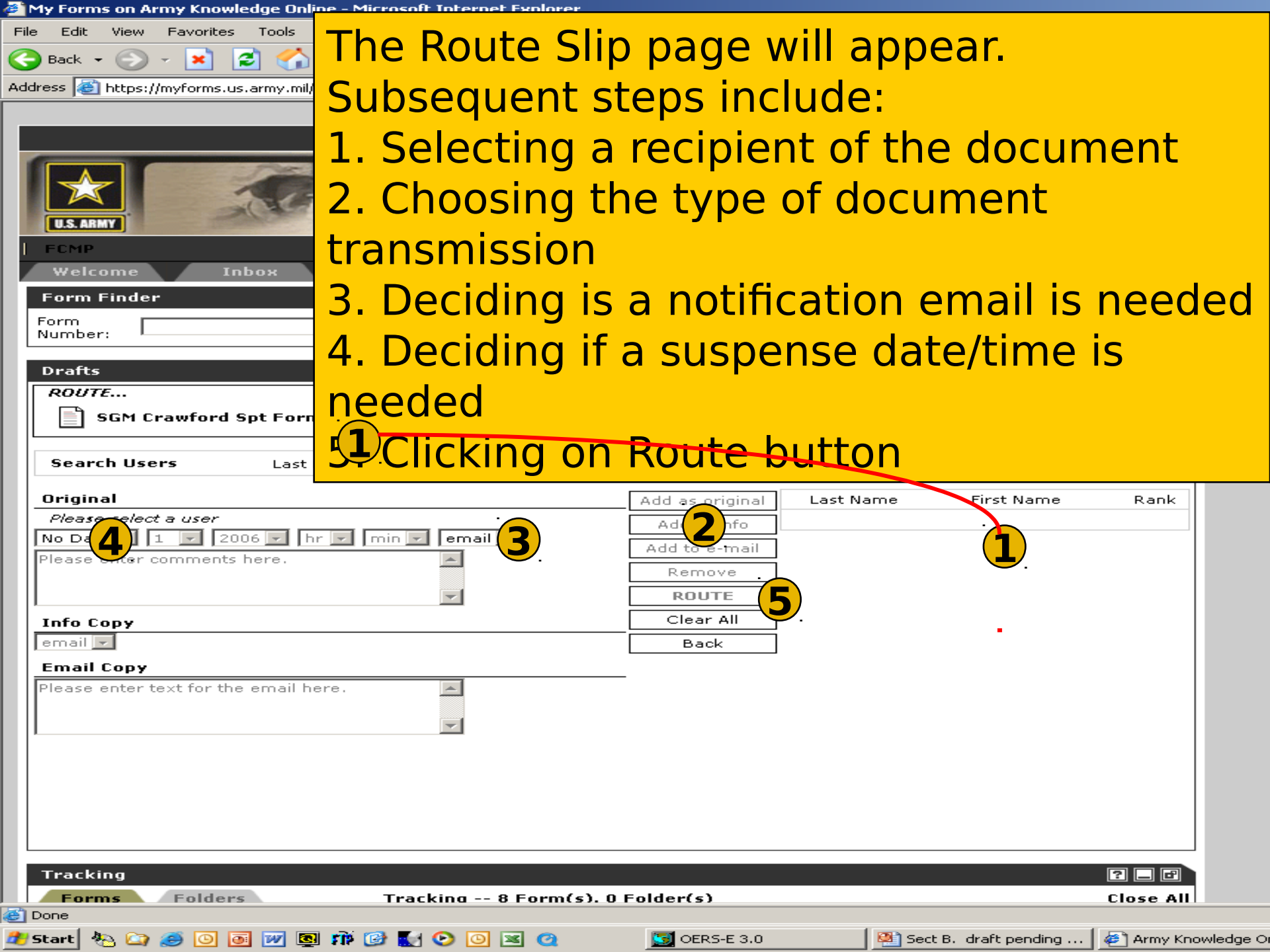
Three options ***(They appear in each form's History as follows:)***

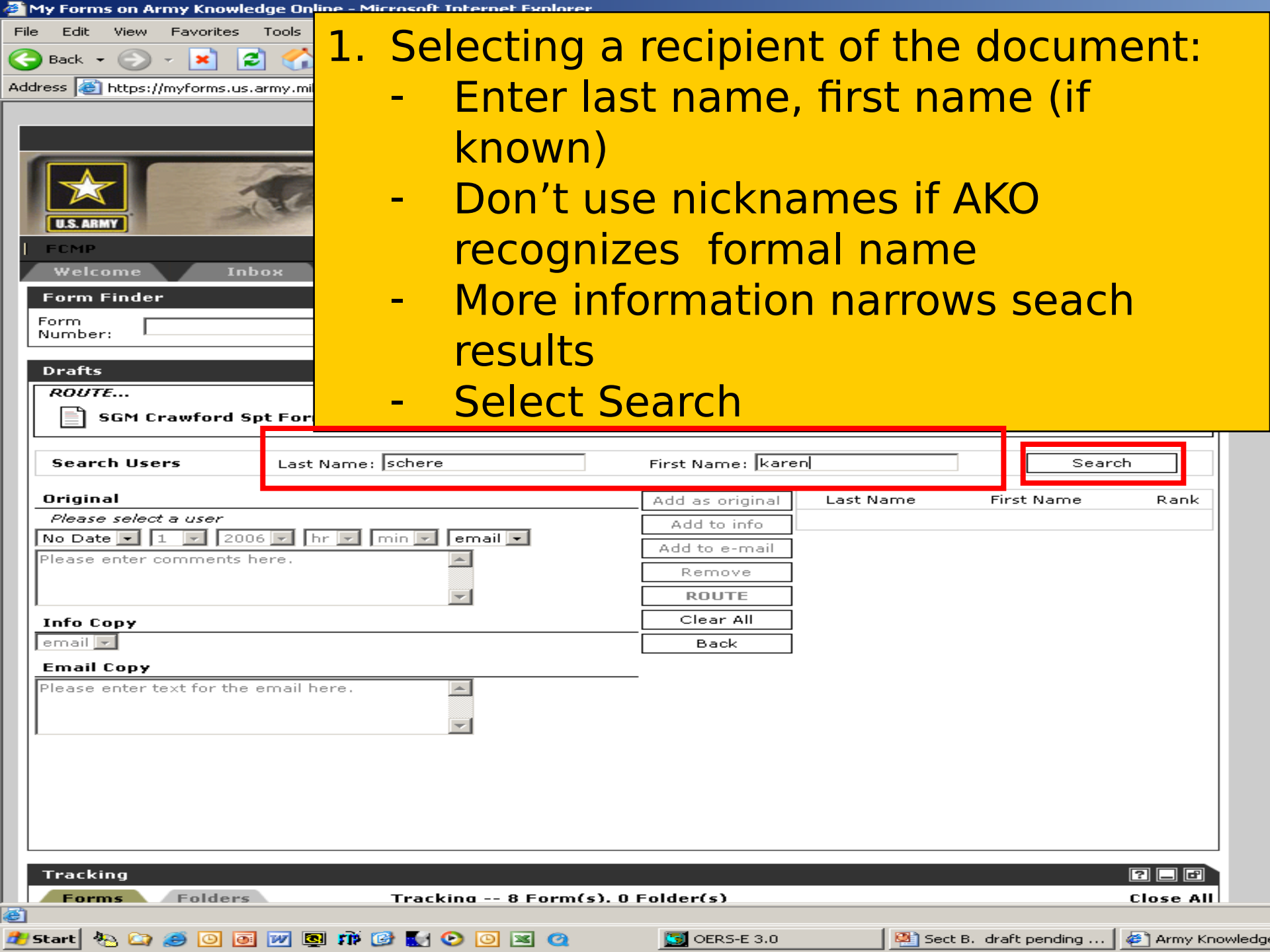
1. **Original** (***original*** **routing)**
2. **Info** (***dynamic*** **routing)**
3. **Email** (***static*** **routing)**

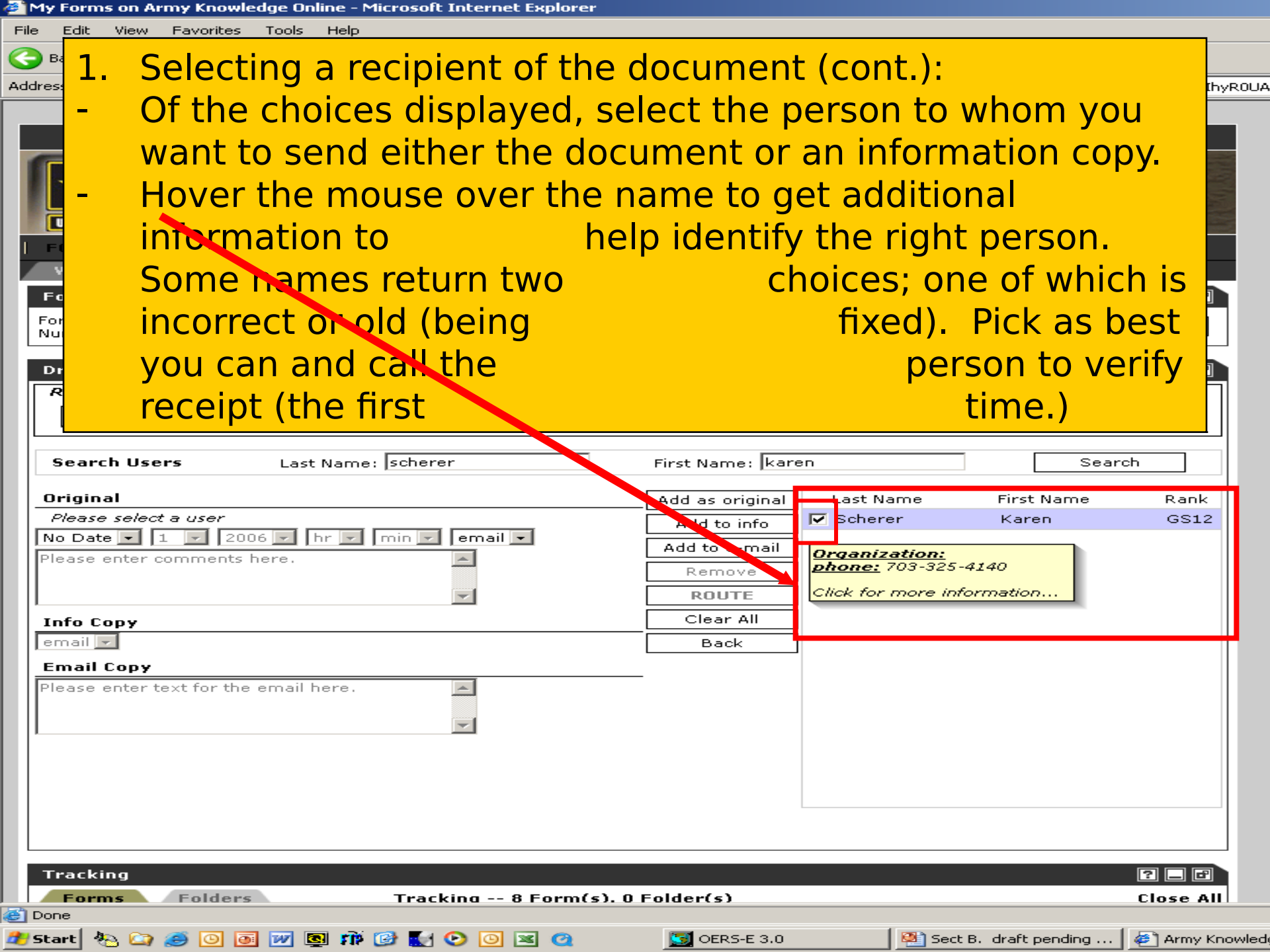
- Forms exceeding suspense dates appear RED in Inbox.
- The "How to Send" instructions for each option are explained in the next slides.


My Forms on Army Knowledge Online - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back
Address https://myforms.us.army.mil/
To route a form:
Select the form you want to route.
U.S. ARMY
U.S. ARMY
Forms Content Management
FCMP
Welcome Inbox Drafts Favorites Recycle Bin Admin Help
Form Finder
Form Number:
Form Title:
Search
Search By Range
Non-PureEdge Forms
Drafts
Forms Folders
Drafts -- 3 Form(s), 1 Folder(s)
1
Close All
Form Name
Form Type
Create Date
Last Action
Suspense Date
Create Folder
Upload Form
Add To Folder
Extract
Comment
Rename
Copy
Delete
Route Slip
Sp. Tasks
Ivee Kee Spt Form Aug 06
DA 7223-1
Aug 07, 2006 19:15:30 GMT
SGM Crawford Spt Form Aug 06
DA 2166-8-1
Aug 07, 2006 19:30:16 GMT
Test Form NCOER S GM Crawford Thr...
TF 2166-8
May 16, 2006 17:10:43 GMT
Tracking
Done
Start
OERS-E 3.0
Sect B. draft pending ...
Army Knowled


My Forms on Army Knowledge Online - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back
Address https://myforms.us.army.mil/
Click on “Route Slip” function.
Welcome Jan ! | Log out
U.S. ARMY
Forms Content Management
FCMP
Welcome Inbox Drafts Favorites Recycle Bin Admin Help
Form Finder
Form Number:
Form Title:
Search
Search By Range
Non-PureEdge Forms
Drafts
Forms Folders
Drafts -- 3 Form(s), 1 Folder(s)
1
Close All
Form Name
Form Type
Create Date
Last Action
Suspense Date
Create Folder
Upload Form
Add To Folder
Extract
Comment
Rename
Copy
Delete
Route Slip
Ivee Kee Spt Form Aug 06
DA 7223-1
Aug 07, 2006 19:15:30 GMT
SGM Crawford Spt Form Aug 06
DA 2166-8-1
Aug 07, 2006 19:30:16 GMT
Test Form NCOER S GM Crawford Thr...
TF 2166-8
May 16, 2006 17:10:43 GMT
Tracking
Done
Start
OERS-E 3.0
Sect B. draft pending ...
Army Knowled


The Route Slip page will appear.
Subsequent steps include:
1. Selecting a recipient of the document
2. Choosing the type of document transmission
3. Deciding is a notification email is needed
4. Deciding if a suspense date/time is needed
5. Clicking on Route button
My Forms on Army Knowledge Online - Microsoft Internet Explorer
File Edit View Favorites Tools
Back
Address https://myforms.us.army.mil/
U.S. ARMY
FCMP
Welcome Inbox
Form Finder
Form Number:
Drafts
ROUTE...
SGM Crawford Spt Form
Search Users Last
Original
Please select a user
No Da 1 2006 hr min email
Please enter comments here.
Info Copy
email
Email Copy
Please enter text for the email here.
Add as original
Add to e-mail
Remove
ROUTE
Clear All
Back
Last Name First Name Rank
Tracking
Forms Folders
Tracking -- 8 Form(s), 0 Folder(s)
Close All
Done
Start
OERS-E 3.0
Sect B. draft pending ...
Army Knowledge On
1
2
3
4
5


1. Selecting a recipient of the document:
- Enter last name, first name (if known)
- Don't use nicknames if AKO recognizes formal name
- More information narrows seach results
- Select Search
My Forms on Army Knowledge Online - Microsoft Internet Explorer
File Edit View Favorites Tools
Back
Address https://myforms.us.army.mi
U.S. ARMY
FCMP
Welcome Inbox
Form Finder
Form Number:
Drafts
ROUTE...
SGM Crawford Spt For
Search Users
Last Name: schere
First Name: karen
Search
Original
Please select a user
No Date 1 2006 hr min email
Please enter comments here.
Info Copy
email
Email Copy
Please enter text for the email here.
Add as original
Add to info
Add to e-mail
Remove
ROUTE
Clear All
Back
Last Name First Name Rank
Tracking
Forms Folders
Tracking -- 8 Form(s), 0 Folder(s)
Close All
Start
OERS-E 3.0
Sect B. draft pending ...
Army Knowledge


My Forms on Army Knowledge Online - Microsoft Internet Explorer
File Edit View Favorites Tools Help
1. Selecting a recipient of the document (cont.):
- Of the choices displayed, select the person to whom you want to send either the document or an information copy.
- Hover the mouse over the name to get additional information to help identify the right person. Some names return two choices; one of which is incorrect or old (being fixed). Pick as best you can and call the person to verify receipt (the first time.)
Search Users
Last Name: scherer
First Name: karen
Search
Original
Please select a user
No Date 1 2006 hr min email
Please enter comments here.
Info Copy
email
Email Copy
Please enter text for the email here.
Add as original
Add to info
Add to email
Remove
ROUTE
Clear All
Back
Last Name First Name Rank
Scherer Karen GS12
Organization:
phone: 703-325-4140
Click for more information...
Tracking
Forms Folders
Tracking -- 8 Form(s), 0 Folder(s)
Close All
Done
Start
OERS-E 3.0
Sect B. draft pending ...
Army Knowled

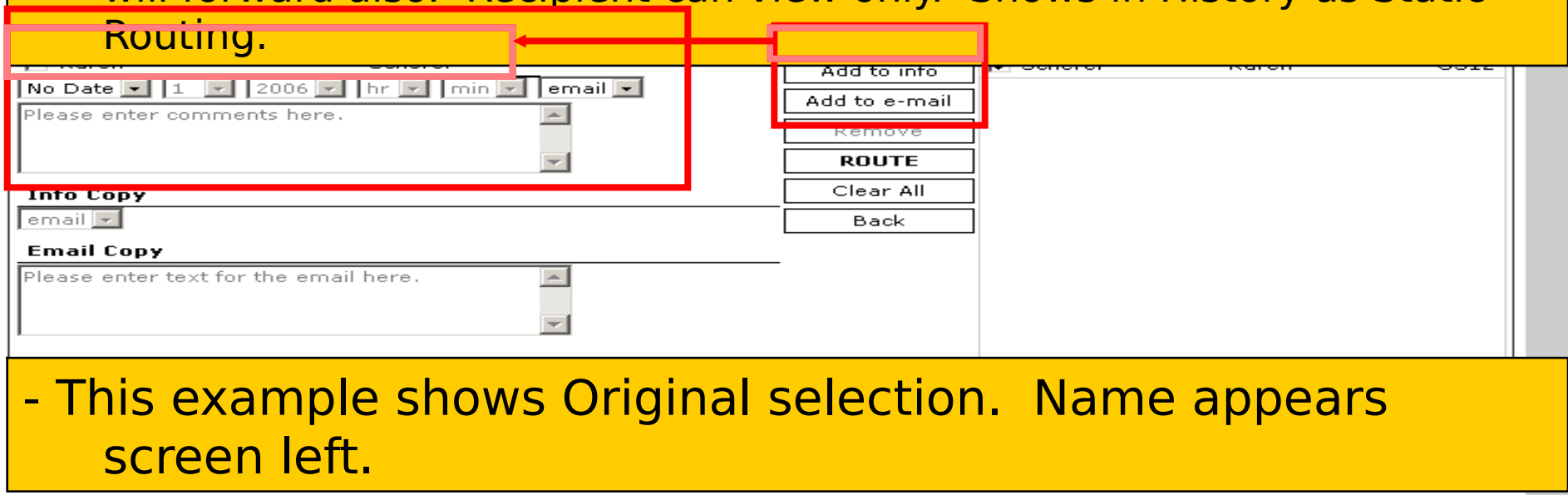
2. Choosing the type of document transmission:

- Select one of the 3 options:

Original – will appear in recipient's inbox. Recipient can add or delete content. There can only be 1 original at any time. Shows in History as Original Routing.

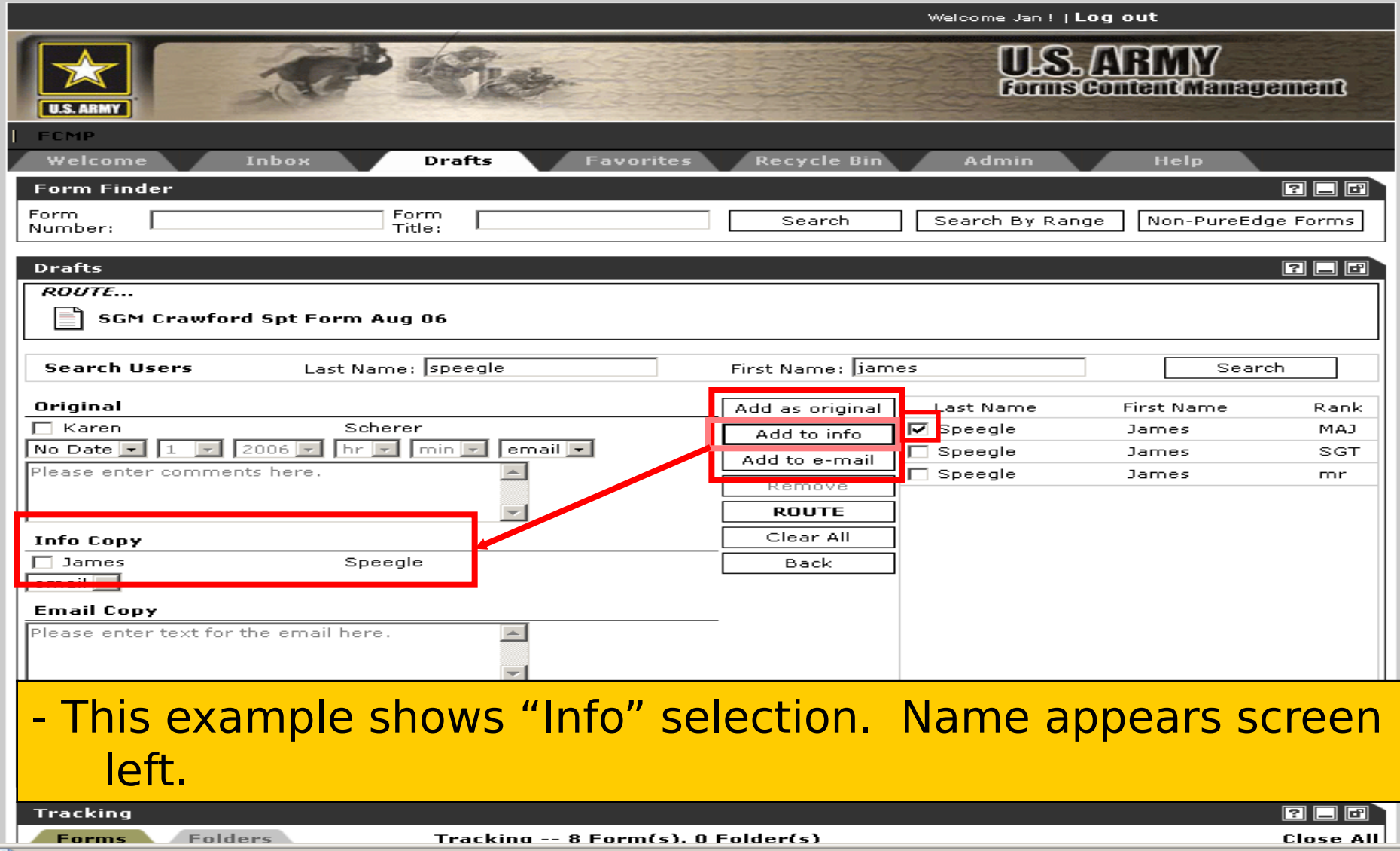
Info – will appear in recipient's tracking section and recipient can view document but cannot alter content or forward to anyone else. Recipient can use comment function. Shows in History as Dynamic Routing.

Email – will appear in recipient's AKO address inbox as an email with the document as an attachment. If the AKO email is forwarded, this email will forward also. Recipient can view only. Shows in History as Static Routing.



- This example shows Original selection. Name appears screen left.

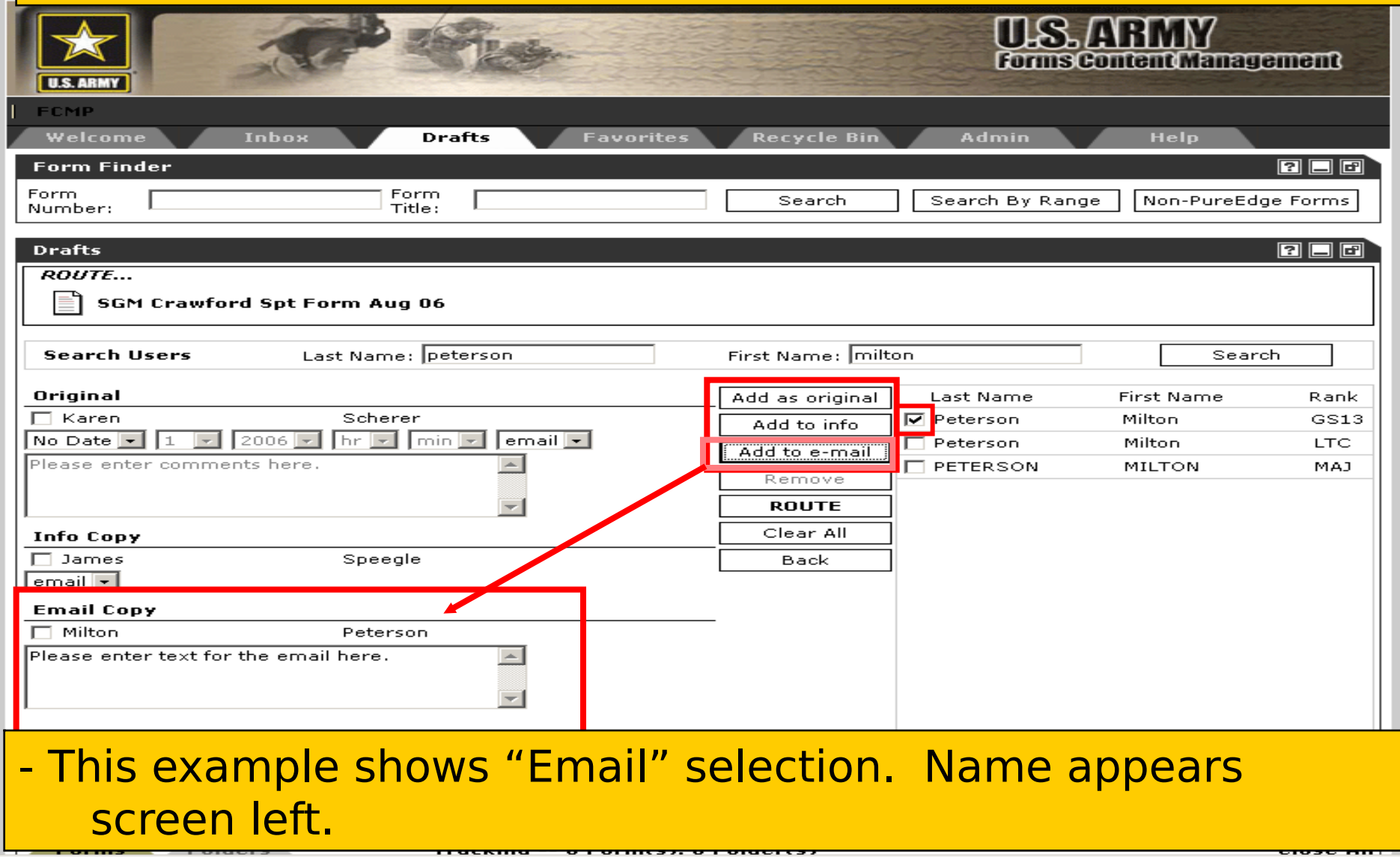
2. Choosing the type of document transmission:
- Select a recipient.
- Select one of the 3 options



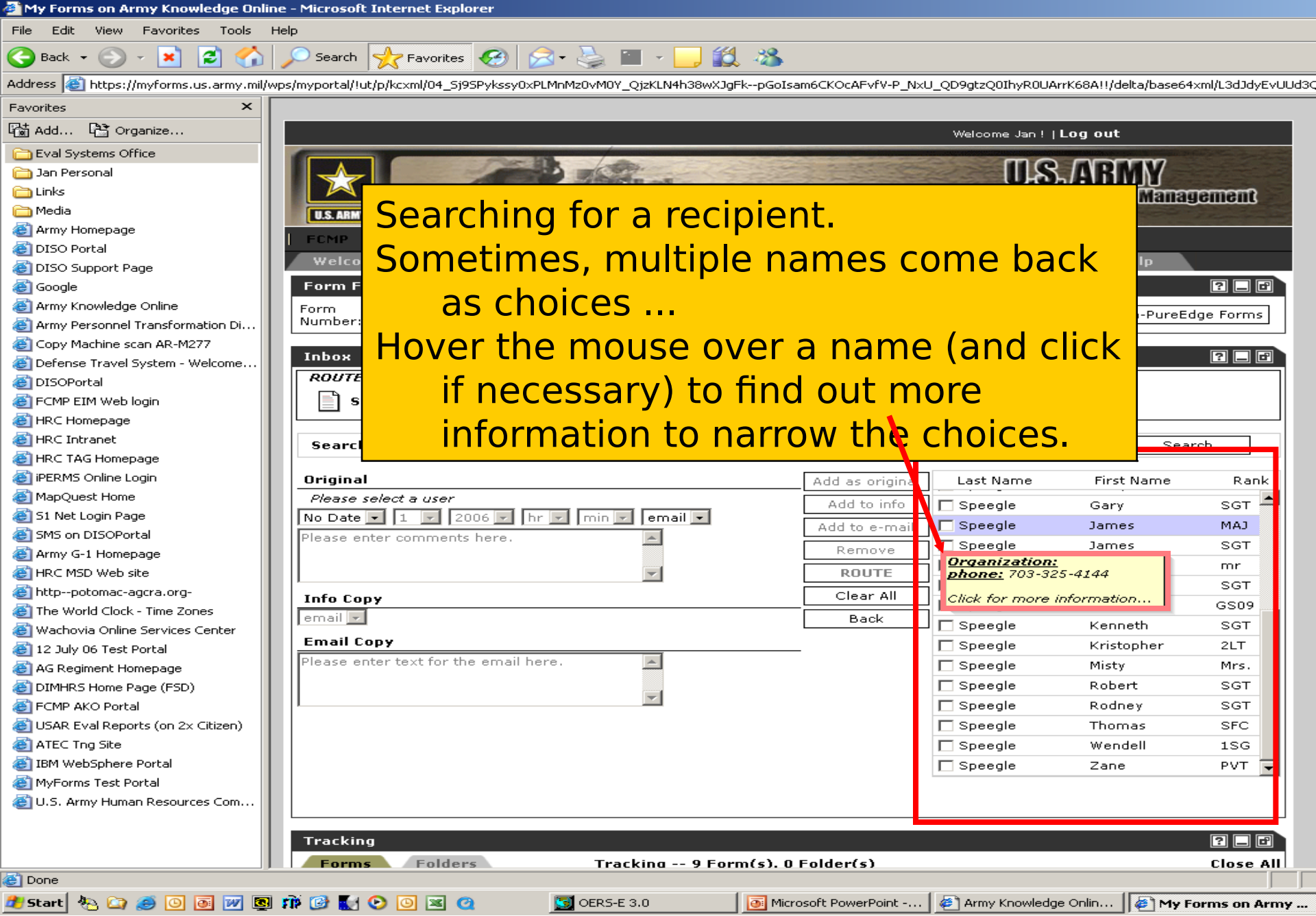
- This example shows “Info” selection. Name appears screen left.

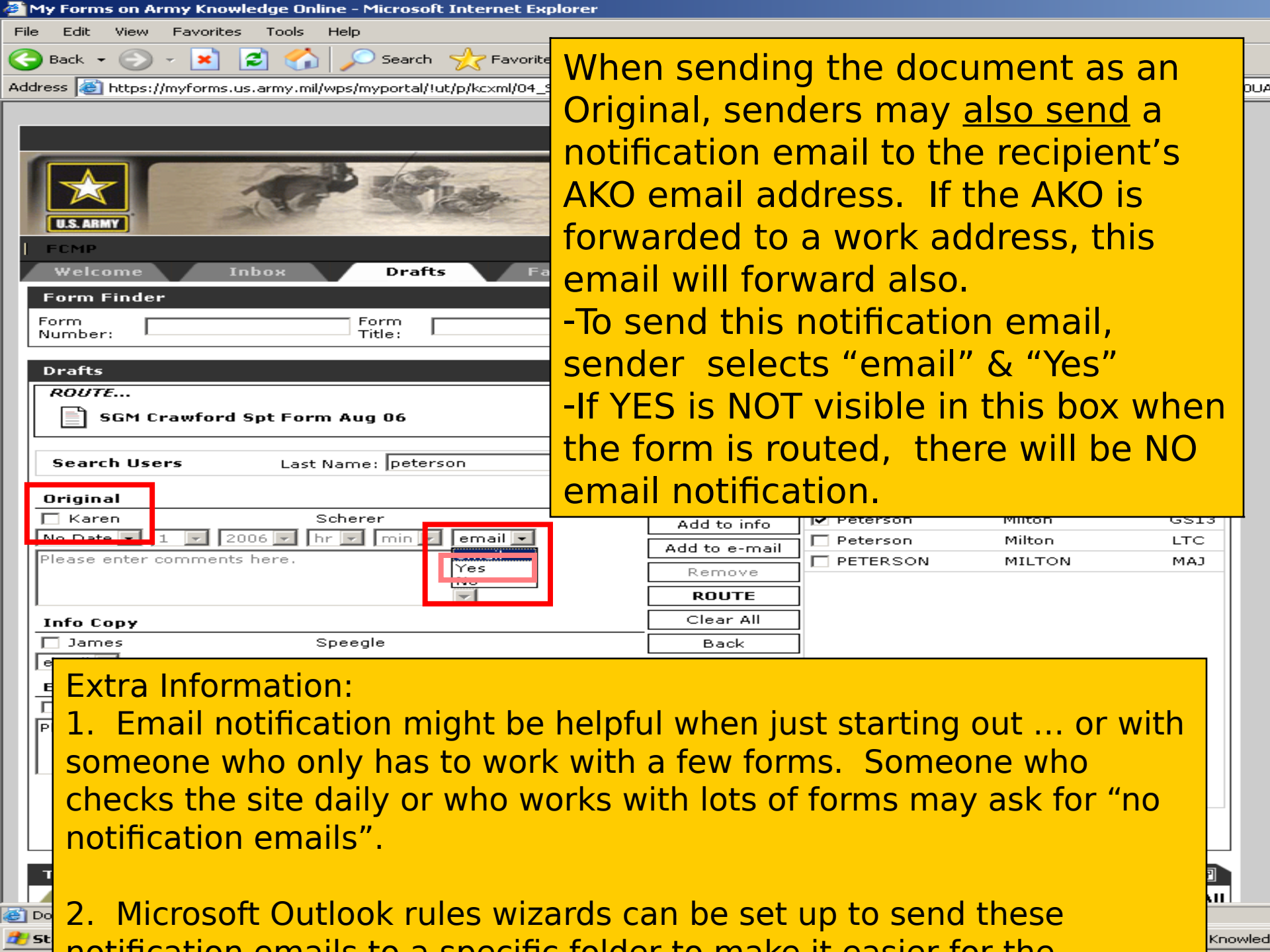
Done
Start
OERS-E 3.0
Sect B. draft pending ...
Army Knowled

2. Choosing the type of document transmission:
- Select a recipient.
- Select one of the 3 options



- This example shows “Email” selection. Name appears screen left.


My Forms on Army Knowledge Online - Microsoft Internet Explorer
Searching for a recipient.
Sometimes, multiple names come back as choices ...
Hover the mouse over a name (and click if necessary) to find out more information to narrow the choices.
Organization:
phone: 703-325-4144
Click for more information...



When sending the document as an Original, senders may <u>also send</u> a notification email to the recipient's AKO email address. If the AKO is forwarded to a work address, this email will forward also.

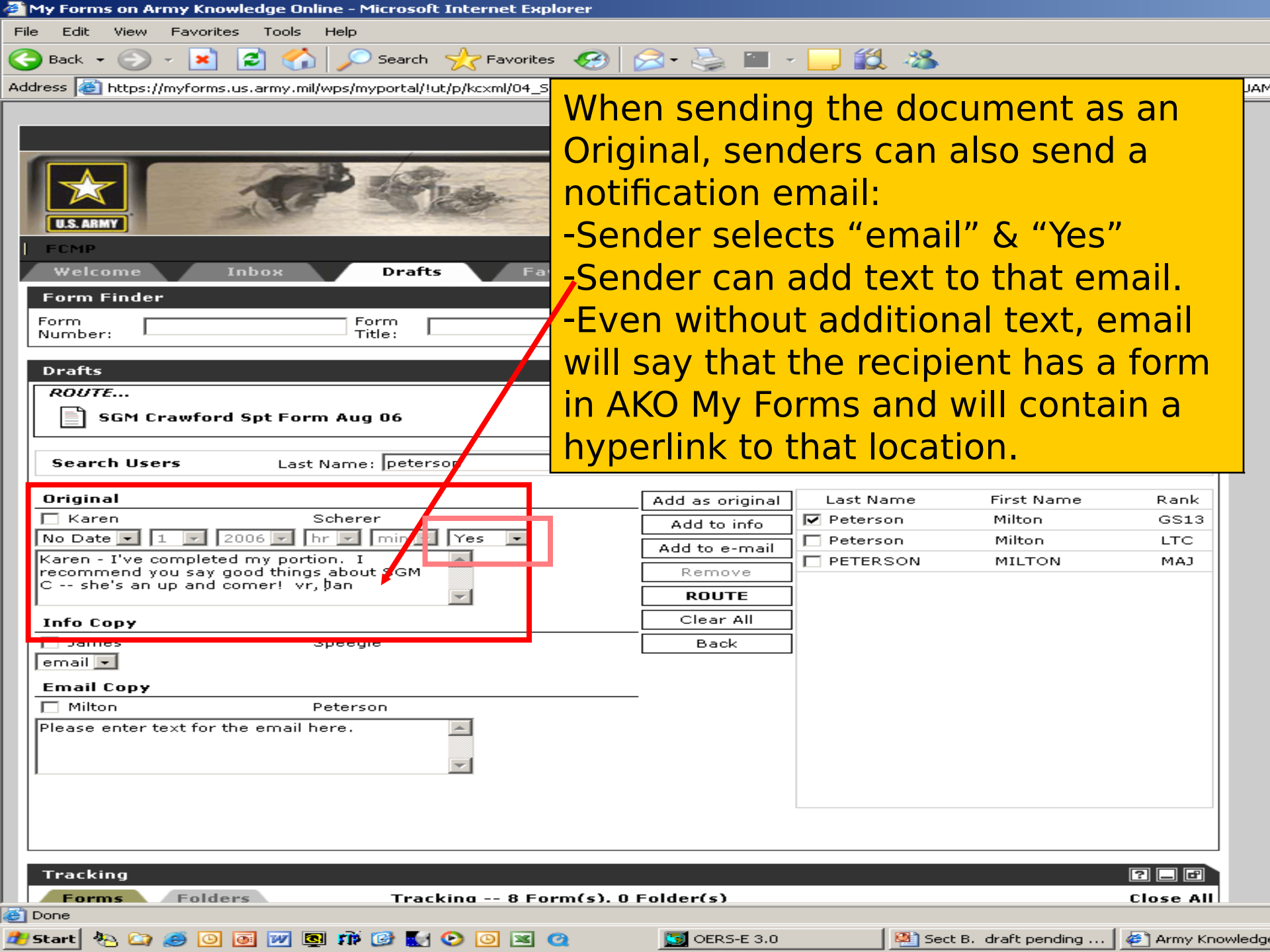
-To send this notification email, sender selects "email" & "Yes"

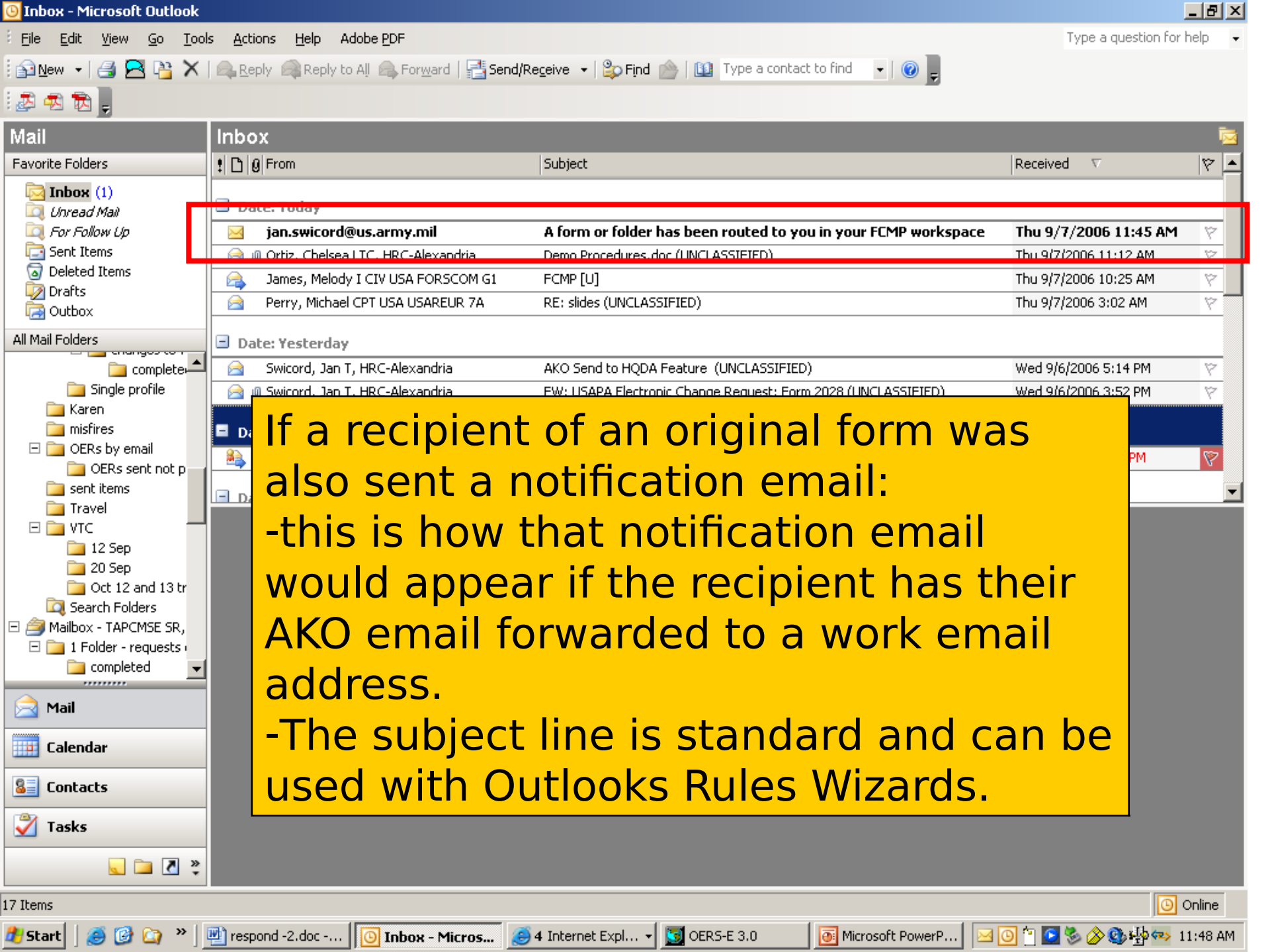
-If YES is NOT visible in this box when the form is routed, there will be NO email notification.

Extra Information:

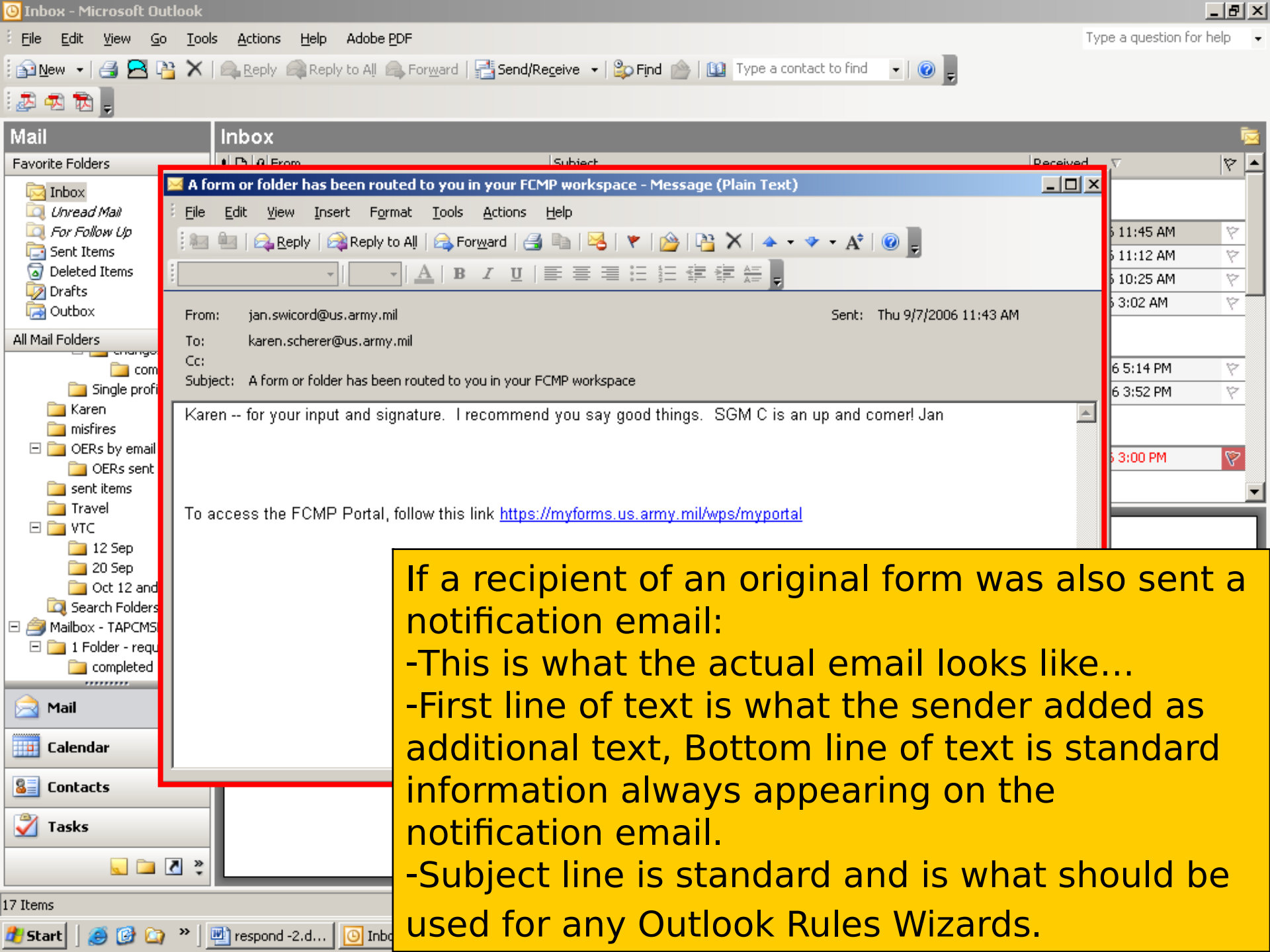
1. Email notification might be helpful when just starting out … or with someone who only has to work with a few forms. Someone who checks the site daily or who works with lots of forms may ask for "no notification emails".

2. Microsoft Outlook rules wizards can be set up to send these


My Forms on Army Knowledge Online - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Search Favorites
Address https://myforms.us.army.mil/wps/myportal/!ut/p/kcxml/04_S
When sending the document as an Original, senders can also send a notification email:
-Sender selects “email” & “Yes”
-Sender can add text to that email.
-Even without additional text, email will say that the recipient has a form in AKO My Forms and will contain a hyperlink to that location.
U.S. ARMY
FCMP
Welcome Inbox Drafts
Form Finder
Form Number:
Form Title:
Drafts
ROUTE...
SGM Crawford Spt Form Aug 06
Search Users
Last Name: peterson
Original
Karen Scherer
No Date 1 2006 hr min Yes
Karen - I've completed my portion. I recommend you say good things about SGM C -- she's an up and comer! vr, Dan
Info Copy
email
Email Copy
Milton Peterson
Please enter text for the email here.
Add as original
Add to info
Add to e-mail
Remove
ROUTE
Clear All
Back
Last Name First Name Rank
Peterson Milton GS13
Peterson Milton LTC
PETERSON MILTON MAJ
Tracking
Forms Folders
Tracking -- 8 Form(s), 0 Folder(s)
Close All
Done
Start
OERS-E 3.0
Sect B. draft pending ...
Army Knowledge



If a recipient of an original form was also sent a notification email:
-this is how that notification email would appear if the recipient has their AKO email forwarded to a work email address.
-The subject line is standard and can be used with Outlooks Rules Wizards.

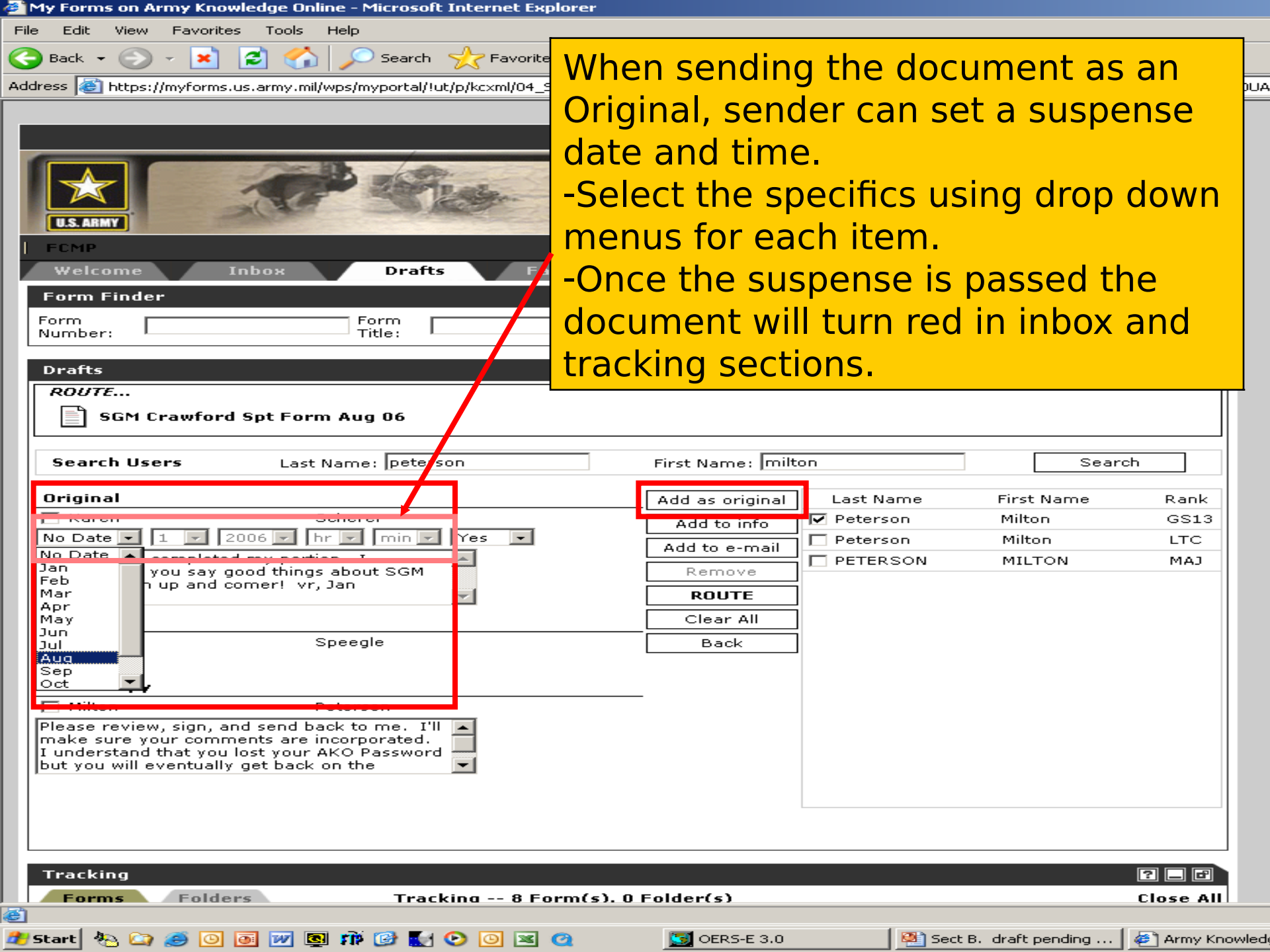


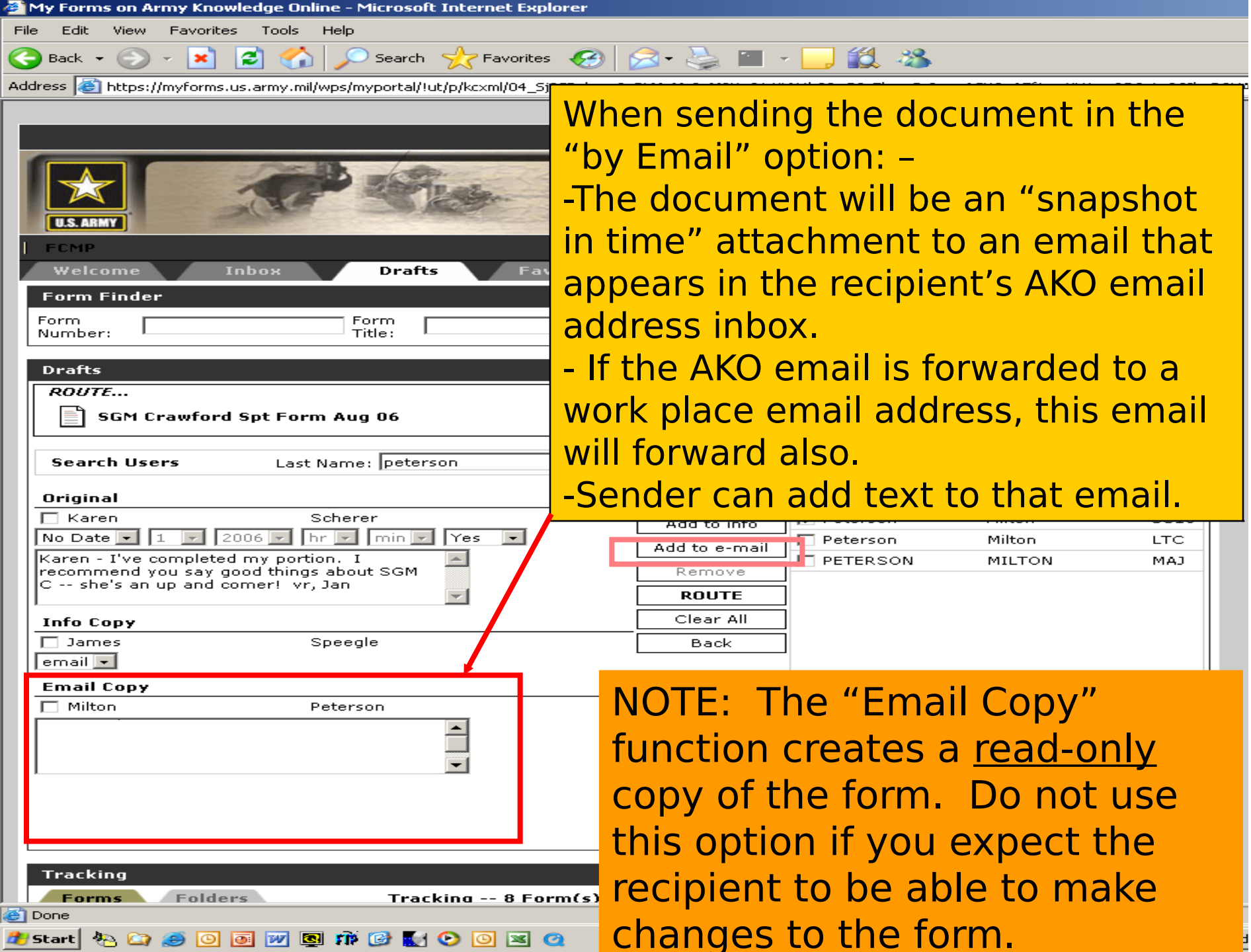
If a recipient of an original form was also sent a notification email:

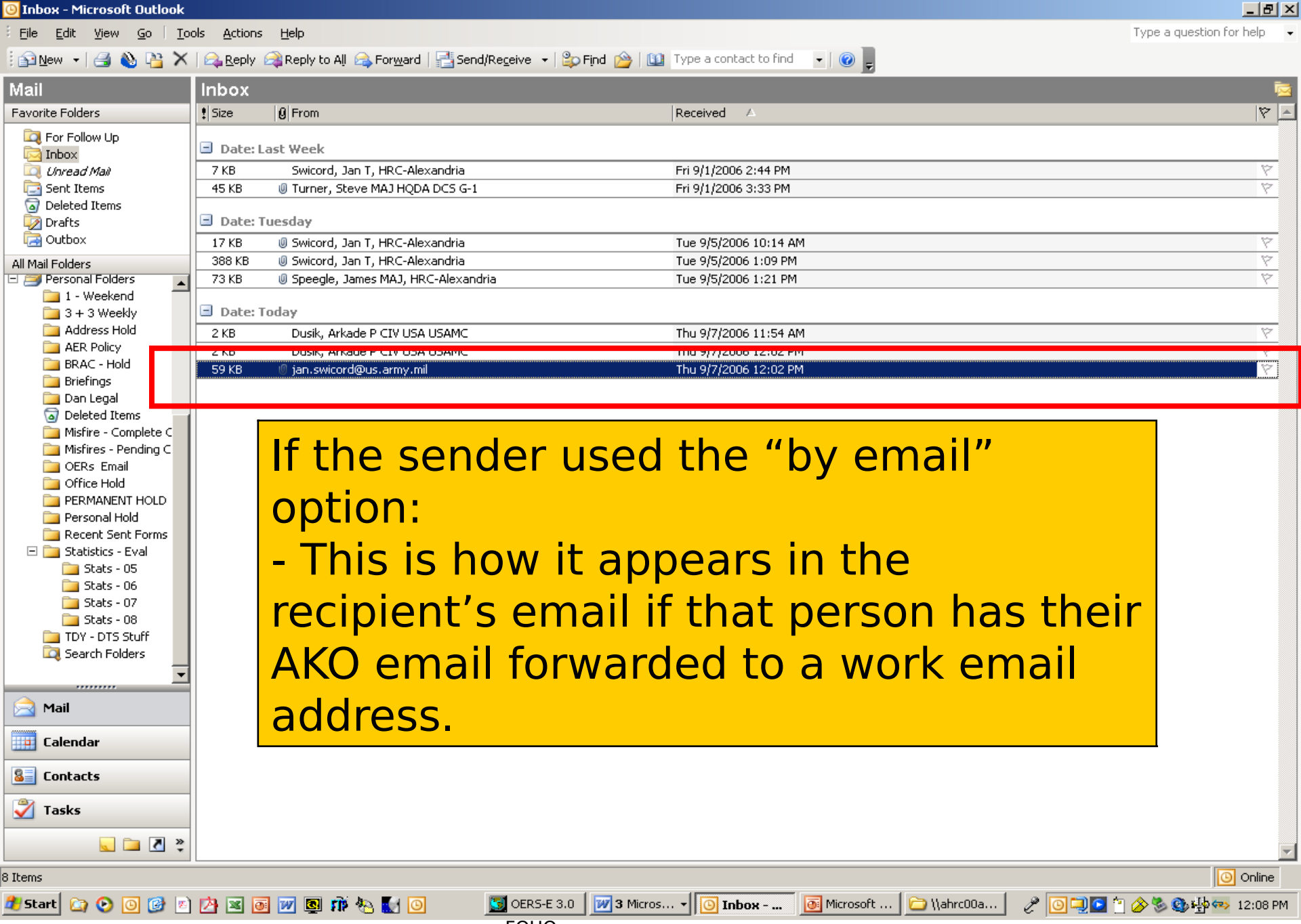
-This is what the actual email looks like…

-First line of text is what the sender added as additional text, Bottom line of text is standard information always appearing on the notification email.

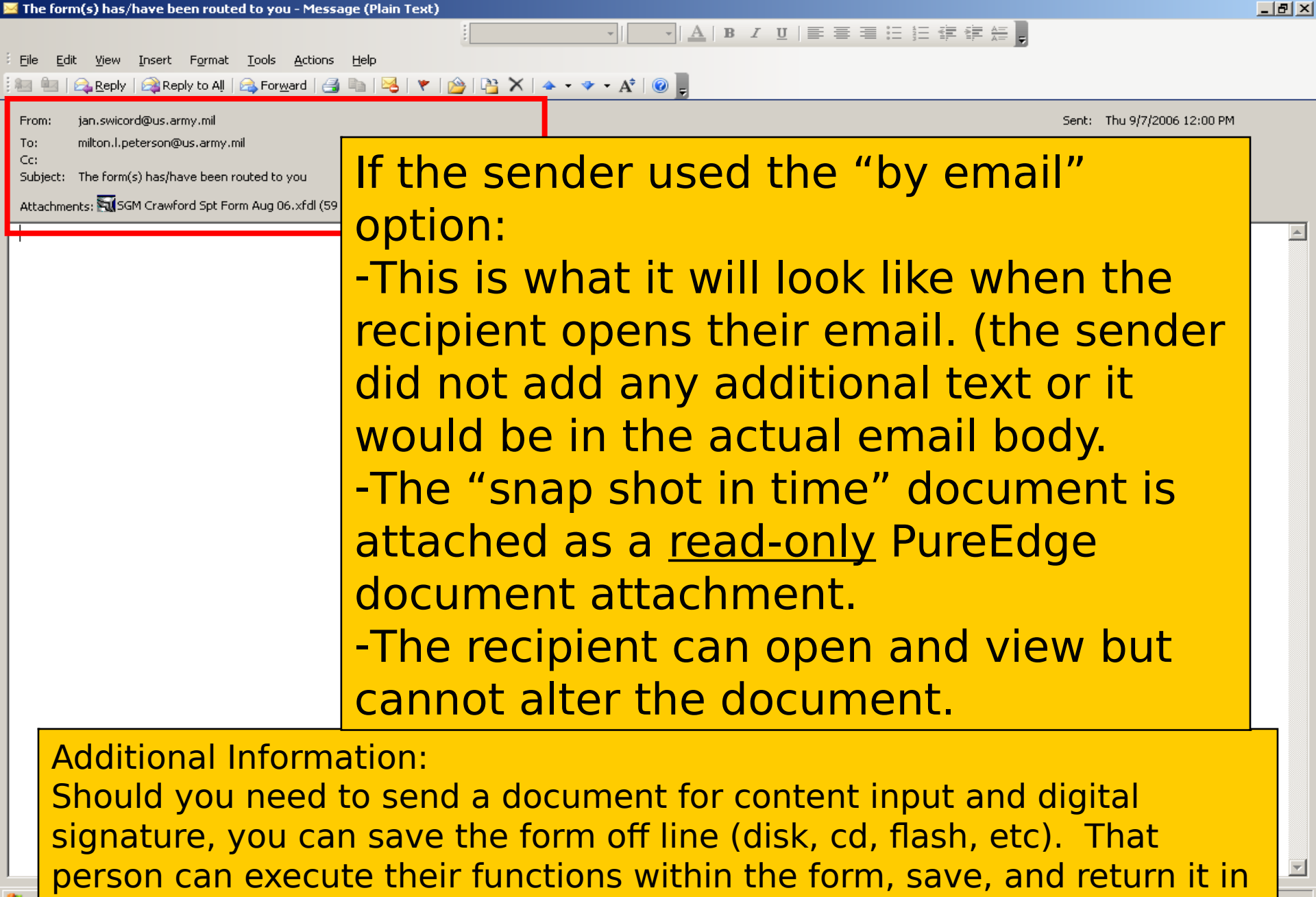
-Subject line is standard and is what should be used for any Outlook Rules Wizards.


My Forms on Army Knowledge Online - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Search Favorite
Address https://myforms.us.army.mil/wps/myportal/!ut/p/kcxml/04_
When sending the document as an Original, sender can set a suspense date and time.
-Select the specifics using drop down menus for each item.
-Once the suspense is passed the document will turn red in inbox and tracking sections.
U.S. ARMY
FCMP
Welcome Inbox Drafts
Form Finder
Form Number:
Form Title:
Drafts
ROUTE...
SGM Crawford Spt Form Aug 06
Search Users
Last Name: peterson
First Name: milton
Search
Original
Add as original
Add to info
Add to e-mail
Remove
ROUTE
Clear All
Back
Last Name First Name Rank
Peterson Milton GS13
Peterson Milton LTC
PETERSON MILTON MAJ
No Date 1 2006 hr min Yes
Jan Feb Mar Apr May Jun Jul Aug Sep Oct
you say good things about SGM
up and comer! vr, Jan
Speegle
Please review, sign, and send back to me. I'll make sure your comments are incorporated. I understand that you lost your AKO Password but you will eventually get back on the
Tracking
Forms Folders
Tracking -- 8 Form(s), 0 Folder(s)
Close All
Start
OERS-E 3.0
Sect B. draft pending ...
Army Knowled


My Forms on Army Knowledge Online - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Search Favorites
Address https://myforms.us.army.mil/wps/myportal/!ut/p/kcxml/04_Sj
U.S. ARMY
FCMP
Welcome Inbox Drafts
Form Finder
Form Number:
Form Title:
Drafts
ROUTE...
SGM Crawford Spt Form Aug 06
Search Users
Last Name: peterson
Original
Karen Scherer
No Date 1 2006 hr min Yes
Karen - I've completed my portion. I recommend you say good things about SGM C -- she's an up and comer! vr, Jan
Info Copy
James Speegle
email
Email Copy
Milton Peterson
Add to Info
Add to e-mail
Remove
ROUTE
Clear All
Back
Peterson Milton LTC
PETERSON MILTON MAJ
Tracking
Forms Folders
Tracking -- 8 Form(s)
When sending the document in the "by Email" option: –
-The document will be an "snapshot in time" attachment to an email that appears in the recipient's AKO email address inbox.
- If the AKO email is forwarded to a work place email address, this email will forward also.
-Sender can add text to that email.
NOTE: The "Email Copy" function creates a read-only copy of the form. Do not use this option if you expect the recipient to be able to make changes to the form.
Done
Start



If the sender used the “by email” option:
- This is how it appears in the recipient’s email if that person has their AKO email forwarded to a work email address.


The form(s) has/have been routed to you - Message (Plain Text)
File Edit View Insert Format Tools Actions Help
Reply Reply to All Forward
From: jan.swicord@us.army.mil
To: milton.l.peterson@us.army.mil
Cc:
Subject: The form(s) has/have been routed to you
Attachments: SGM Crawford Spt Form Aug 06.xfdl (59
Sent: Thu 9/7/2006 12:00 PM

If the sender used the “by email” option:

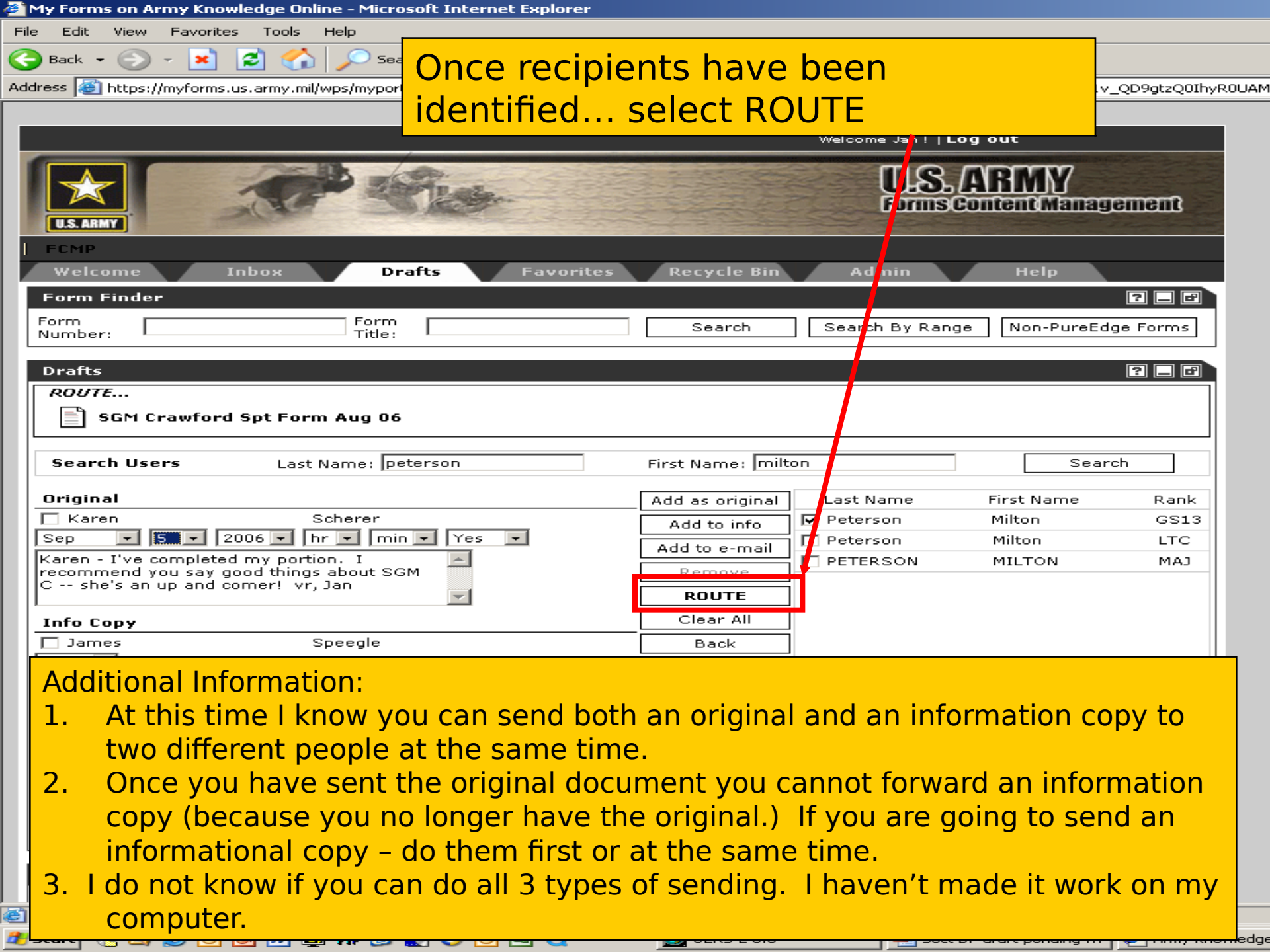
-This is what it will look like when the recipient opens their email. (the sender did not add any additional text or it would be in the actual email body.

-The “snap shot in time” document is attached as a read-only PureEdge document attachment.

-The recipient can open and view but cannot alter the document.

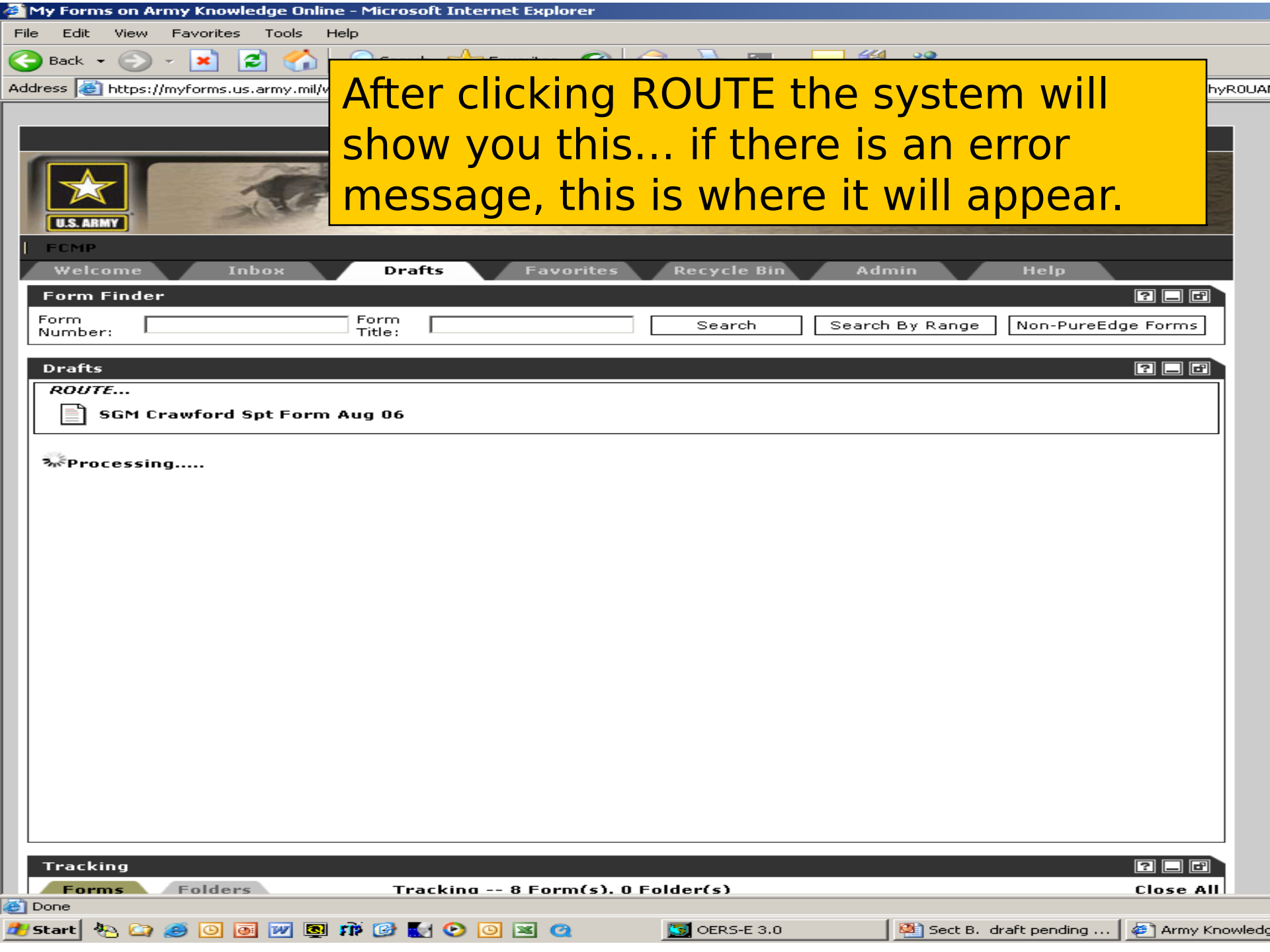
Additional Information:

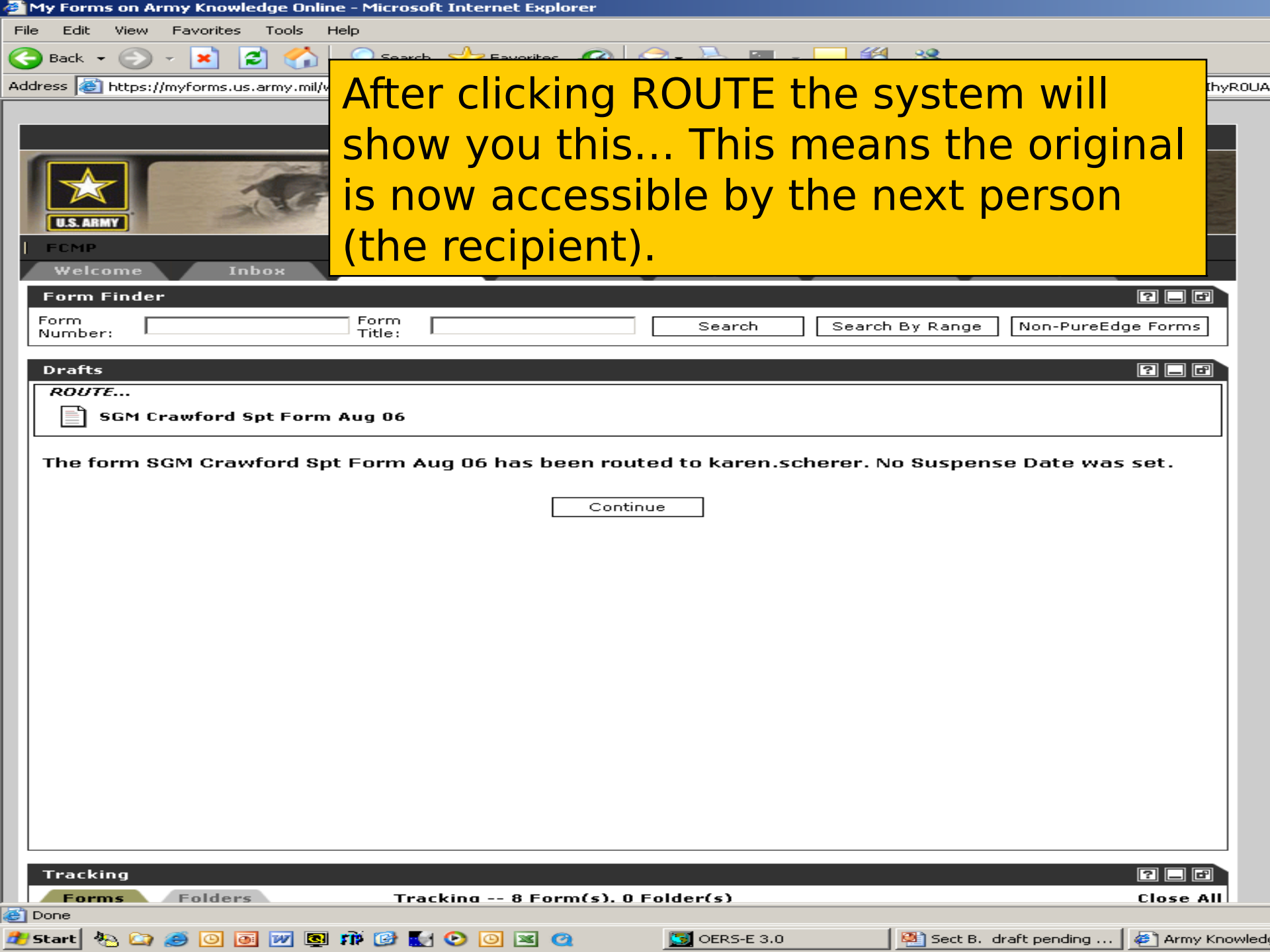
Should you need to send a document for content input and digital signature, you can save the form off line (disk, cd, flash, etc). That person can execute their functions within the form, save, and return it in the same manner to be uploaded into AKO My Forms.

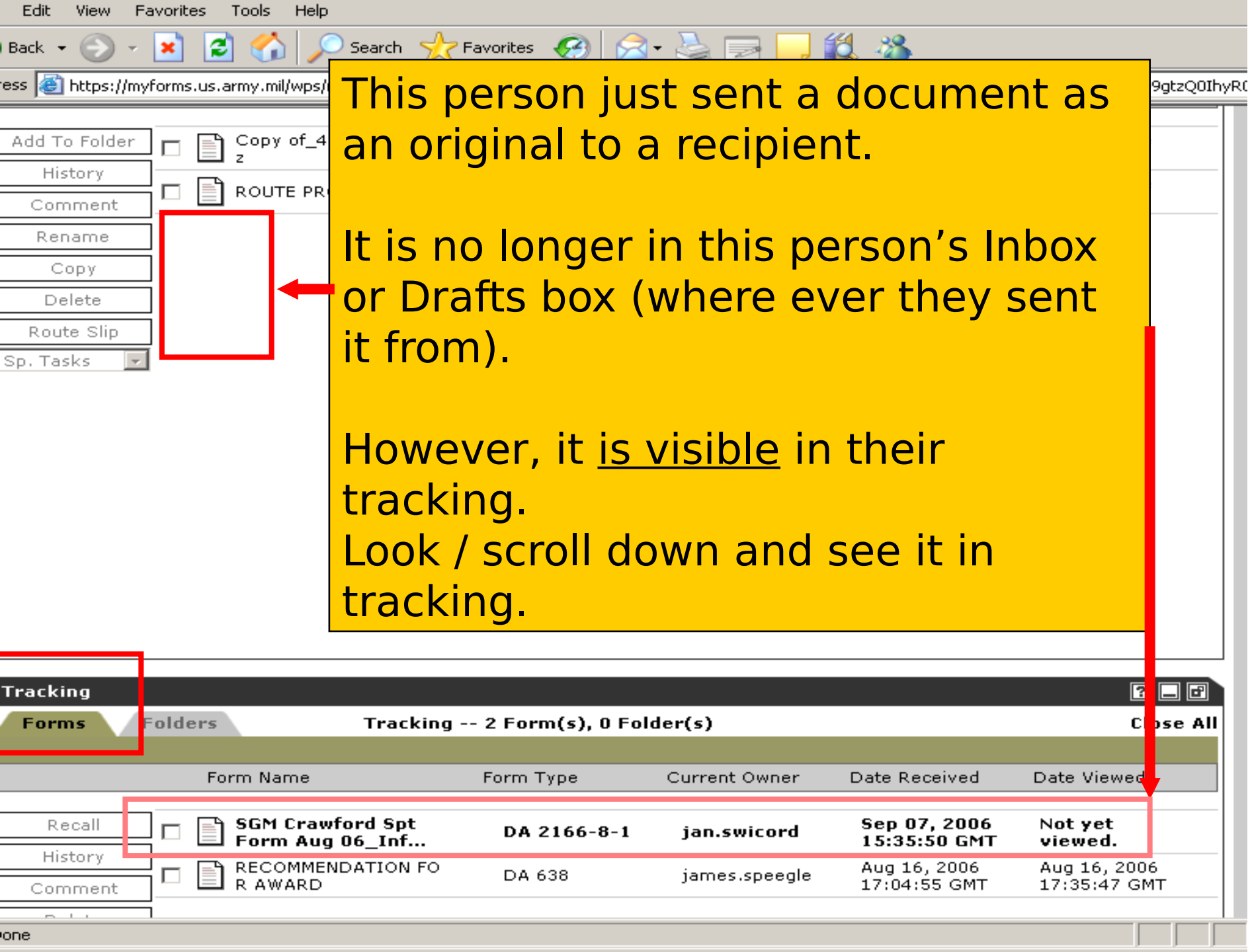


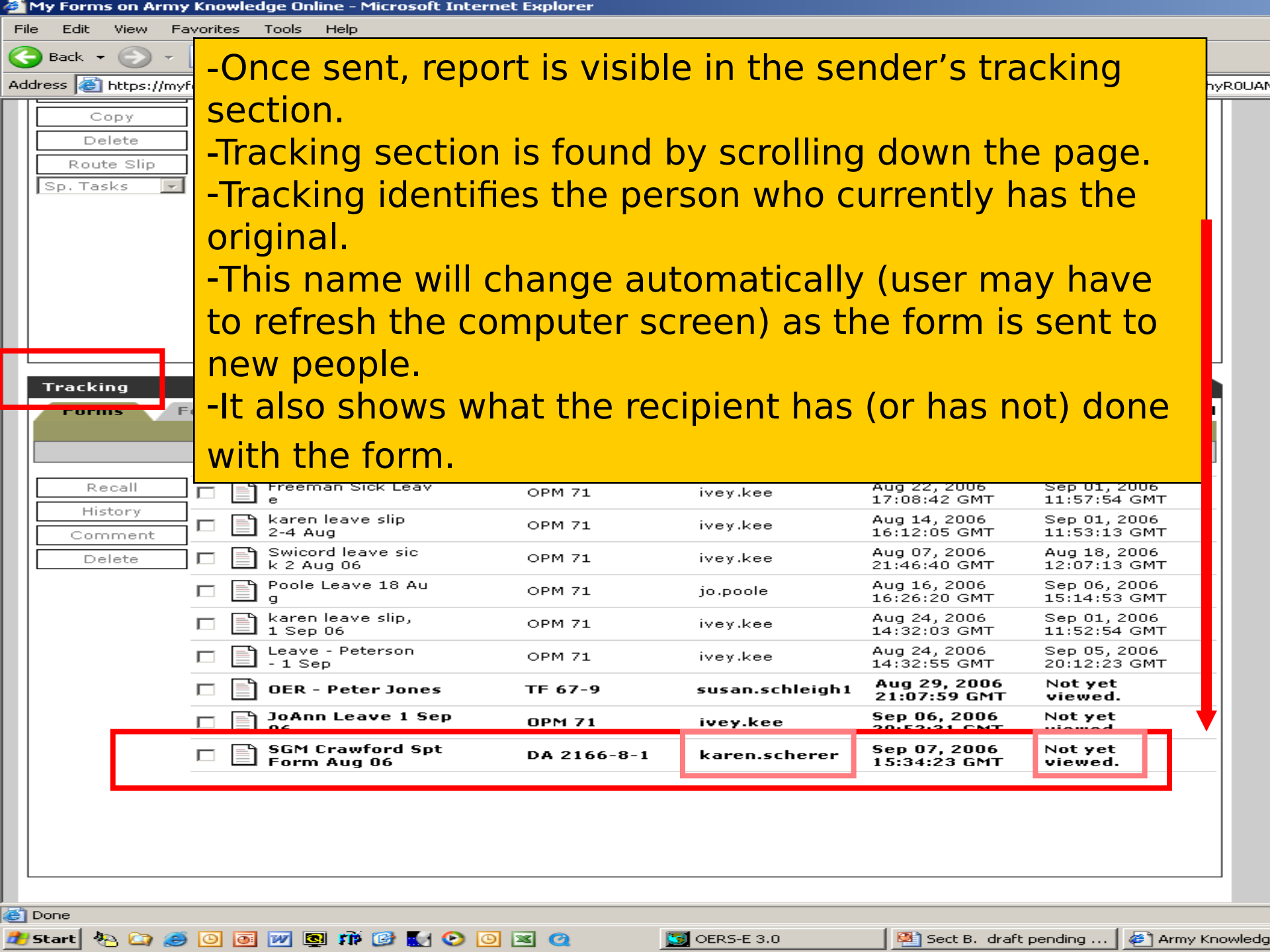
Additional Information:

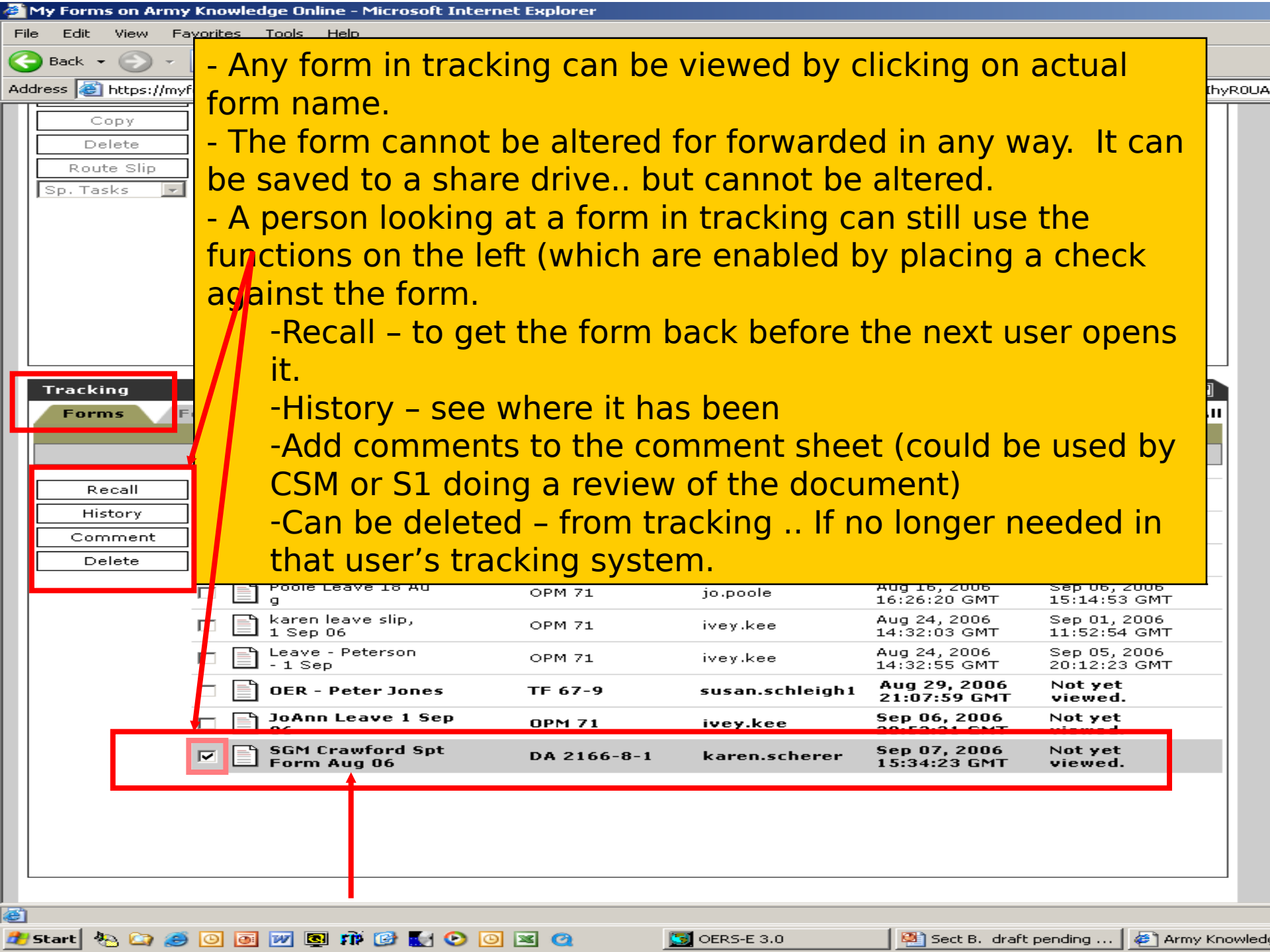
1. At this time I know you can send both an original and an information copy to two different people at the same time.
2. Once you have sent the original document you cannot forward an information copy (because you no longer have the original.) If you are going to send an informational copy – do them first or at the same time.
3. I do not know if you can do all 3 types of sending. I haven't made it work on my computer.

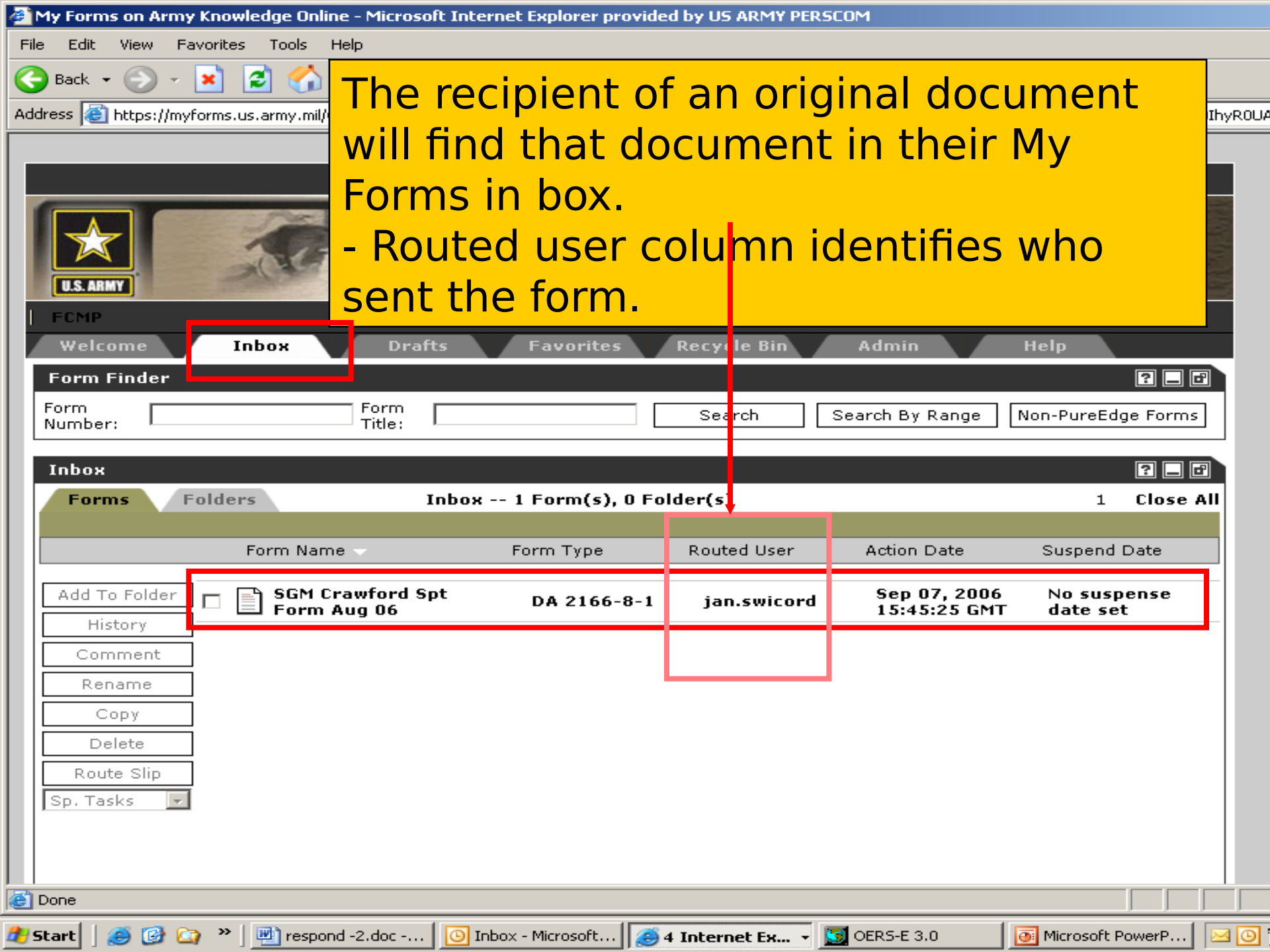

My Forms on Army Knowledge Online - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back
Address https://myforms.us.army.mil/
After clicking ROUTE the system will show you this... if there is an error message, this is where it will appear.
U.S. ARMY
FCMP
Welcome Inbox Drafts Favorites Recycle Bin Admin Help
Form Finder
Form Number:
Form Title:
Search
Search By Range
Non-PureEdge Forms
Drafts
ROUTE...
SGM Crawford Spt Form Aug 06
Processing.....
Tracking
Forms Folders
Tracking -- 8 Form(s), 0 Folder(s)
Close All
Done
Start
OERS-E 3.0
Sect B. draft pending ...
Army Knowledg


My Forms on Army Knowledge Online - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back
Address https://myforms.us.army.mil/
After clicking ROUTE the system will show you this... This means the original is now accessible by the next person (the recipient).
U.S. ARMY
FCMP
Welcome Inbox
Form Finder
Form Number:
Form Title:
Search
Search By Range
Non-PureEdge Forms
Drafts
ROUTE...
SGM Crawford Spt Form Aug 06
The form SGM Crawford Spt Form Aug 06 has been routed to karen.scherer. No Suspense Date was set.
Continue
Tracking
Forms Folders
Tracking -- 8 Form(s), 0 Folder(s)
Close All
Done
Start
OERS-E 3.0
Sect B. draft pending ...
Army Knowled


Edit View Favorites Tools Help
Back Search Favorites
https://myforms.us.army.mil/wps/
Add To Folder
History
Comment
Rename
Copy
Delete
Route Slip
Sp. Tasks
Copy of_4
z
ROUTE PR
This person just sent a document as an original to a recipient.
It is no longer in this person's Inbox or Drafts box (where ever they sent it from).
However, it is visible in their tracking.
Look / scroll down and see it in tracking.
Tracking
Forms
Folders
Tracking -- 2 Form(s), 0 Folder(s)
Form Name
Form Type
Current Owner
Date Received
Date Viewed
Recall
History
Comment
SGM Crawford Spt Form Aug 06_Inf...
DA 2166-8-1
jan.swicord
Sep 07, 2006 15:35:50 GMT
Not yet viewed.
RECOMMENDATION FOR AWARD
DA 638
james.speegle
Aug 16, 2006 17:04:55 GMT
Aug 16, 2006 17:35:47 GMT


My Forms on Army Knowledge Online - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back
Address https://myf
Copy
Delete
Route Slip
Sp. Tasks
-Once sent, report is visible in the sender's tracking section.
-Tracking section is found by scrolling down the page.
-Tracking identifies the person who currently has the original.
-This name will change automatically (user may have to refresh the computer screen) as the form is sent to new people.
-It also shows what the recipient has (or has not) done with the form.
Tracking
Forms
Recall
History
Comment
Delete
Freeman Sick Leav e OPM 71 ivey.kee Aug 22, 2006 17:08:42 GMT Sep 01, 2006 11:57:54 GMT
karen leave slip 2-4 Aug OPM 71 ivey.kee Aug 14, 2006 16:12:05 GMT Sep 01, 2006 11:53:13 GMT
Swicord leave sic k 2 Aug 06 OPM 71 ivey.kee Aug 07, 2006 21:46:40 GMT Aug 18, 2006 12:07:13 GMT
Poole Leave 18 Au g OPM 71 jo.poole Aug 16, 2006 16:26:20 GMT Sep 06, 2006 15:14:53 GMT
karen leave slip, 1 Sep 06 OPM 71 ivey.kee Aug 24, 2006 14:32:03 GMT Sep 01, 2006 11:52:54 GMT
Leave - Peterson - 1 Sep OPM 71 ivey.kee Aug 24, 2006 14:32:55 GMT Sep 05, 2006 20:12:23 GMT
OER - Peter Jones TF 67-9 susan.schleigh1 Aug 29, 2006 21:07:59 GMT Not yet viewed.
JoAnn Leave 1 Sep OPM 71 ivey.kee Sep 06, 2006 Not yet
SGM Crawford Spt Form Aug 06 DA 2166-8-1 karen.scherer Sep 07, 2006 15:34:23 GMT Not yet viewed.
Done
Start
OERS-E 3.0
Sect B. draft pending ...
Army Knowledg


My Forms on Army Knowledge Online - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back
Address https://myf
Copy
Delete
Route Slip
Sp. Tasks
Tracking
Forms
Recall
History
Comment
Delete
- Any form in tracking can be viewed by clicking on actual form name.
- The form cannot be altered for forwarded in any way. It can be saved to a share drive.. but cannot be altered.
- A person looking at a form in tracking can still use the functions on the left (which are enabled by placing a check against the form.
-Recall – to get the form back before the next user opens it.
-History – see where it has been
-Add comments to the comment sheet (could be used by CSM or S1 doing a review of the document)
-Can be deleted – from tracking .. If no longer needed in that user's tracking system.
Poole Leave 18 Aug
OPM 71
jo.poole
Aug 16, 2006 16:26:20 GMT
Sep 06, 2006 15:14:53 GMT
karen leave slip, 1 Sep 06
OPM 71
ivey.kee
Aug 24, 2006 14:32:03 GMT
Sep 01, 2006 11:52:54 GMT
Leave - Peterson - 1 Sep
OPM 71
ivey.kee
Aug 24, 2006 14:32:55 GMT
Sep 05, 2006 20:12:23 GMT
OER - Peter Jones
TF 67-9
susan.schleigh1
Aug 29, 2006 21:07:59 GMT
Not yet viewed.
JoAnn Leave 1 Sep
OPM 71
ivey.kee
Sep 06, 2006
Not yet
SGM Crawford Spt Form Aug 06
DA 2166-8-1
karen.scherer
Sep 07, 2006 15:34:23 GMT
Not yet viewed.
Start
OERS-E 3.0
Sect B. draft pending ...
Army Knowled


My Forms on Army Knowledge Online - Microsoft Internet Explorer provided by US ARMY PERSCOM
File Edit View Favorites Tools Help
Back
Address https://myforms.us.army.mil/
The recipient of an original document will find that document in their My Forms in box.
- Routed user column identifies who sent the form.
U.S. ARMY
FCMP
Welcome Inbox Drafts Favorites Recycle Bin Admin Help
Form Finder
Form Number:
Form Title:
Search
Search By Range
Non-PureEdge Forms
Inbox
Forms Folders
Inbox -- 1 Form(s), 0 Folder(s)
1
Close All
Form Name
Form Type
Routed User
Action Date
Suspend Date
Add To Folder
History
Comment
Rename
Copy
Delete
Route Slip
Sp. Tasks
SGM Crawford Spt Form Aug 06
DA 2166-8-1
jan.swicord
Sep 07, 2006 15:45:25 GMT
No suspense date set
Done
Start
respond -2.doc -...
Inbox - Microsoft...
4 Internet Ex...
OERS-E 3.0
Microsoft PowerP...

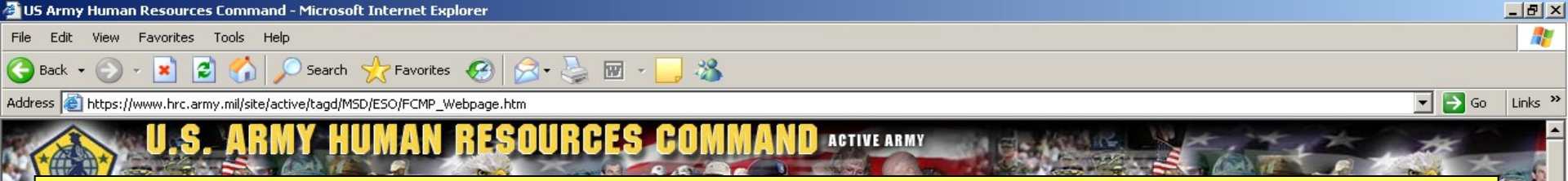
Points of Contact

Evaluation Systems Office:
Telephone: (703) 325-9660 (DSN: 221) (if someone is here this number always gets answered)
Email: tapcmse@conus.army.mil
Website:
https://www.hrc.army.mil/site/active/tagd/MSD/msdweb.htm

- OER SME: (703) 325-4144 (DSN: 221)
- NCOER SME: (703) 325-8009 (DSN: 221)
- AER SME: (703) 325-4110 (DSN: 221)

Army Publishing Directorate (APD):
FCMP Help Desk: (703) 428-0545
Email: APDFCMP@hqda.army.mil

Army Information Assurance CAC PKI Help Desk: for software questions / portal defect reporting
Toll free: (866) 738-3222
Local: (703) 769-4499
Email: iacacpki.helpdesk@us.army.mil


US Army Human Resources Command - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Search Favorites
Address https://www.hrc.army.mil/site/active/tagd/MSD/ESO/FCMP_Webpage.htm
Go Links
U.S. ARMY HUMAN RESOURCES COMMAND ACTIVE ARMY

More information is located here...

Electronic OER & NCOER
(Forms Content Management Program)

Current Information:
- Info Brief & Slide Demo
- FCMP Frequently Asked Questions
- What's not in this first version of FCMP that we want?

User Training (Automated)
-Short
-By Functions & Processes

(currently under development)

General Description:
An electronic OER and NCOER are the pilot forms in a much larger venture called Forms Content Management Program (FCMP) run by Army Publishing Directorate.

Who: For the Army's 3 components and individuals with AKO access.

What: An improved method of retrieving, routing, and completing forms and business processes.

Where: You get, complete, and route forms through an AKO web page.

When: Program elements start iteratively. An AKO forms page should be available Dec 05, a first version of 'wizardized' OER and NCOER expected soon thereafter.

Points of Contact:
- Evaluation Systems Office
  Army Publishing Directorate
- Providing Feedback (how and who)

User Training (Power Point)
- AKO Forms Page User Guide
- Sect 1. Overview
- Sect 2. Eval Policy
- Sect 3. Eval Processing
- Sect 4. FCMP Portal Functions
- Sect 5. FCMP Eval Forms
- Sect 6. What is Missing?
- Sect 7. Special Issues
- Sect 8. SOP Items - Evals
- Sect 9. Electronic (CAC) Signing
- Sect 10. Senior Leader FCMP Briefing
- Sect A. Specific Trng Electronic (CAC) Signature

G-1/S-1 Specifics:
- Milper MSG: WO
- Milper MSG: Gen Policy & Transition

To get here – on MSD website select "What's New" and Electronic OER & NCOER (FCMP)